Biographies

Anne Coles and Suzanna Rickeard are Information Officers at Lawrence Graham LLP, where they have created and run over a dozen annual induction programmes for new trainees. Anne is a committee member of BIALL's PR & Promotions Committee, and Suzanna is an Assistant Editor of the CLSIG Newsletter.

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Practical Matters

Getting the Most from a Database Trial

Abstract: A vendor launches what they promise to be a fantastic new product which you can not do without so you set up a trial. At the end of the trial you have lots of well-balanced feedback from across your organisation that you can use to determine whether or not to take the product and which also gives you some points for negotiation. Well, that is the theory anyway! In this article Chrissy Street aims to give some guidance about how to get closer to this in practice.
Keyword: online databases

First steps

Appoint a trial manager. The person can vary for each trial but it means that there is someone responsible for the trial and all tasks relating to it.

Establish what it is you will be trialling by asking for details from the vendor prior to any meeting. This should include: a product description, potential benefits of subscribing, any technical specification, licence model, terms and conditions, pricing, account management contact details, trial parameters, e.g. how long, any restrictions, etc.

Hold an initial demonstration of the product for one or two interested parties to assess the content and functionality of the product including authority and currency of the materials and knowledge of the vendor contact. There is no point in trialling a product if the part you are interested in is not fully available, or if the product does not meet expectations. It is also useful to ensure that the vendor contact is able to give a comprehensive and knowledgeable demonstration of the product without being too sales focused.

Obtain approval for the trial from the budget holder/s. It is not good practice to enter into a trial if there will be no funds to purchase the product. The budget holder/s approval may also affect the trial's timing. For example, if the budget for the current financial year has already been committed, the trial may need to wait for a few months.

Identify your trial group. Know which groups will be taking part in the trial. Establish your champions within the group. These are people who have a key interest in the product and will actively encourage participation and feedback. Consider holding a demo for them prior to starting the trial.

Planning the trial

Think about when you will hold the trial, how long you will trial it for, what communications you will send, what training you will arrange, how you will gather feedback and how you will conclude the trial. You should also start to implement your pre-subscription procedures, such as reviewing the terms and conditions, in order to be in a position to move to a full subscription if required.

When to hold your trial

Things to consider:

- ***Trial group availability*** – avoid trainee related dates e.g. seat changes and new intake. Avoid busy periods such as when a big deal is going on. Avoid times when your champion/s are on holiday. Avoid popular holiday times such as school term holidays or around bank holidays.
- ***Other resources*** – will this new product potentially replace an existing subscription? If so, make sure the trial is complete within plenty of time of the renewal date.
- ***Financial implications*** – if there is no budget this financial year the trial should be completed in time for the next financial planning cycle instead.
- ***Length of trial*** - this needs to be long enough that you can really test the product but should not drift on indefinitely. Four weeks is usually about right, with a review at the two week stage to start your feedback gathering.
- ***Training sessions*** – consider how many sessions are required, in what format and for whom. Put them in the trial group's diaries. Consider using online training such as webex as well as traditional meeting-based methods. If your trial group has limited time can you attend a group meeting to give a quick introduction to the product?

Communications

Plan your communication timetable and put the key dates in Outlook to remind yourself.

What to communicate:

- ***Service details*** – outline what it is that you are trialling and why you are trialling it. Do you want your trial group to test any particular content, functionality or element of support?
- ***Key dates*** - include trial start and end dates, deadlines for feedback (ideally this should be a few days before the trial ends), training dates.
- ***Contact details during the trial*** – where possible queries should be filtered through the trial manager so that a record can be kept of all issues that arose during the trial. This may highlight a technical or content issue, areas where the training is lacking or where the service is not intuitive.
- ***How feedback will be gathered*** – specify how feedback will be formally gathered and invite the group to provide informal feedback along the way.

What will work in terms of gathering the best feedback will vary from firm to firm and person to person, so consider a variety of methods and work out which works best for you. When planning your questions, remember that you want positive, negative and constructive comments. You also need to know what was used as well as what was not used in order for you to shape negotiations with the vendor.

Options to consider:

- ***Guided feedback*** – asking for comments on specific components of the service.
- ***Open question feedback*** – asking open questions on the service generally. For example, what did you find useful?
- ***Wiki page*** – set up a wiki page for everyone to comment, works well as all contributors can see what others in the trial group thought.
- ***Online survey*** – using a tool such as Survey Galaxy or Survey Monkey, set up a survey to gather your feedback. Useful for summarising and analysing the feedback neatly and easily.
- ***Feedback form*** – hard copy or electronic word or email document. Co-ordination of feedback is a manual process.
- ***One to one interviews with key users from the trial group*** - also consider interviews with people who did not use the service during the trial to establish why. This allows you to get some really in-depth feedback. Useful as an addition to one of the other methods.
- ***Group interview/feedback session***– good for generating discussion on the trial. Useful as an addition to one of the other methods.

Concluding the trial

Once you have gathered your feedback, review it and draw your conclusions on the trial. Decide whether the feedback gives you a strong enough business case to subscribe and if so, obtain approval from the budget holder/s to proceed. Communicate the feedback summary and decision to your trial group. Pull out the appropriate feedback and communicate this to the vendor along with the approved decision. If subscribing, start your negotiations including the points from the feedback as part of the process. If not subscribing, be sure to explain why. Keep an internal record of the feedback from the trial so that this can be referred to in future.

Biography

Chrissy Street is Central Information Services Manager at Clifford Chance LLP and a former Chair of the BIALL Legal Information Group.

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