GTME TE Technology Evaluation Program

Summary

This tech evaluation program ensures that every tool is thoroughly evaluated through a structured categorization (EAR framework) and tech ecosystem impact analysis. The EAR framework helps define the type of value the technology offers, and the ecosystem analysis ensures it fits well with existing systems without introducing redundancies or unnecessary complexity.

By involving the right people, tools, and processes, this program helps your team make data-driven decisions quickly, focusing resources only on the technologies that will have the greatest impact.

Objective

The objective of the technology evaluation program is to identify and implement tools that align with business priorities, enhance productivity, and deliver measurable outcomes. By categorizing, assessing, and integrating technologies efficiently, the strategy ensures seamless adoption, ecosystem harmony, and maximum ROI.

EAR Framework

The EAR Framework is a structured way to assess how a technology impacts your organization by categorizing it into three key roles:

- **Enhance**
  - Improves or optimizes existing processes without significant changes.
  - Example: Upgrading an analytics tool to provide faster or more detailed insights.
- **Augment**
  - Adds new capabilities that were not possible with traditional methods or current tools.
  - Example: Introducing AI-driven learning modules to personalize training programs.
- **Replace**
  - Fully replaces outdated workflows or technologies with more efficient solutions.
  - Example: Migrating from an old CRM system to a modern, cloud-based platform.

Why Use the EAR Framework?

The framework helps prioritize technologies based on their role in your organization's strategy:

- **Enhance** focuses on incremental improvements.
- **Augment** drives innovation by filling capability gaps.
- **Replace** eliminates inefficiencies by modernizing systems.

This approach ensures every tool is evaluated for its specific contribution to business goals.

Summary of EAR Integration in the Tiered Strategy

The EAR framework becomes a guiding principle across all three tiers:

- **Tier 1:** Acts as a quick filter to determine if the technology offers meaningful value (Enhance, Augment, Replace).
- **Tier 2:** Influences lightweight scoring and prioritization by weighting EAR categories based on strategic goals.
- **Tier 3:** Guides the full evaluation, testing how well the technology aligns with the desired outcomes for enhancement, augmentation, or replacement.

This helps us align with the type of value each technology provides, helping focus resources on the technologies that deliver the highest impact.

Process

Resources

- GTME TE T1 Tech Eval - Use Case Collection TEMPLATE.xlsx
- GTME TE T2-T3 Tech Eval - Feature Set and Biz Impact TEMPLATE.xlsx

How-To

Existing Technology Full Analysis

Tier	Objective	Scorecard Criteria	Steps to Analyze	Cost Threshold Integration	Scoring Decision
Tier 1	Collect admin/developer sentiment and use cases (jobs-to-be-done).	- Primary Function - Alignment with EAR (Enhance, Augment, Replace) - Use Case Collection - Relevance to GTME Goals - Ecosystem Fit	1. Conduct sentiment surveys. 2. Categorize tool using EAR. 3. Map key use cases. 4. Estimate **TCO** using licensing, implementation, and training costs. 5. Score relevance and alignment (1-5 scale).	- Tools with TCO > $50,000 advance to Tier 2. - Tools <$50,000 remain in Tier 1 unless adoption is broad (>50%).	- **≥ 70%:** Advance to Tier 2. - **< 50%:** Deprecate. - **50%-70%:** Explore further or RFP if gaps exist.
Tier 2	Assess business fit, features,	- Business Fit - Feature Set Completeness	1. Use Feature Set Template to score criteria.	- High-cost tools (> $50,000) must show	- **≥ 70%:** Advance to Tier 3.

	scalability, and end-user sentiment.	- Ease of Use-**User Impact** (End-user sentiment) - Scalability - Integration	2. Conduct user surveys. 3. Interview stakeholders. 4. Assess integration and scalability. 5. Normalize score (out of 100).	strong business fit and impact. - Low-cost tools (< $50,000) stop here unless critical or broad adoption (>50%).	- **< 50%:** Deprecate. - **50%-70%:** Pilot or RFP.
Tier 3	Validate long-term ROI, user adoption, and scalability.	- ROI - User Adoption - Knowledge Transfer - Scalability - Business Alignment	1. Conduct pilot testing. 2. Gather feedback from stakeholders and users. 3. Use adoption metrics and sentiment data. 4. Score each criterion (1-5 scale). 5. Normalize score (out of 100).	- ROI/KPI analysis mandatory for tools > $100,000 or those impacting >50% of users. - Moderate-cost tools ($50,000-$100,000) evaluated for strategic alignment.	- **≥ 80%:** Recommend adoption/renewal. - **< 50%:** Deprecate. - **50%-80%:** Recommend RFP or alternatives.
Tier 4	Consolidate findings and deliver a clear, actionable recommendation.	- Weighted Scores from Tiers 1-3: - Tier 1: 20% - Tier 2: 30% - Tier 3: 50% - Overall alignment - Risks and alternatives	1. Consolidate weighted scores. 2. Draft a recommendation report. 3. Highlight key findings and rationale (e.g., ROI, feedback). 4. Identify next steps for adoption, RFP, or deprecation.	- Adjust weighting to prioritize ROI/KPI for tools > $100,000. - Justify costs in final recommendations for high-cost tools.	- **≥ 80%:** Recommend adoption/renewal. - **< 50%:** Deprecate. - **50%-80%:** Recommend RFP.

New Technology Pilot Analysis

- **Reduced Criteria:** Focuses only on critical factors: functionality, user impact, and potential ROI.
- **Quick Decision Points:** Each tier has a go/no-go decision to avoid unnecessary evaluation.
- **Lightweight Feedback:** Relies on small-scale pilots or informal feedback loops to save time.
- **Budget Focus:** Tools <$50,000 in TCO require less rigorous assessment unless adoption is broad.

Tier	Objective	Key Criteria	Steps to Analyze	Decision Thresholds

Tier 1	Collect initial insights and relevance.	- Primary Function - Use Cases - Fit with GTME Goals - Basic TCO Estimate	1. Identify key jobs-to-be-done. 2. Align with GTME priorities (e.g., Learning, Performance Support). 3. Estimate TCO.	- Relevant with TCO <$50K: Proceed to Tier 2. - Not relevant or redundant: Stop evaluation.
Tier 2	Assess functionality and user impact.	- Business Fit - Features - Ease of Use - User Sentiment	1. Conduct lightweight feature assessment. 2. Gather quick feedback from potential users/admins. 3. Score on a 1-5 scale.	- Functionality meets 70% of use cases: Proceed to Tier 3. - Insufficient fit: Stop evaluation.
Tier 3	Validate impact and scalability.	- Adoption Potential - ROI Potential - Scalability	1. Conduct a small-scale pilot. 2. Gather user feedback on adoption and perceived value. 3. Estimate ROI/scalability potential.	- Positive ROI or strategic fit: Recommend pilot expansion or adoption. - Negative ROI: Stop evaluation.

Tiers Explanation & Scoring

Tiers	Evaluation Focus	Decision Point	Criteria Focus	Weight (Existing Tool)	Weight (New Tool)
1	Categorize tool; evaluate relevance for existing tools or alignment with jobs-to-be-done/use cases	Does the tool address clear needs or gaps in the ecosystem? Proceed to Tier 2 if yes.	Alignment with organizational needs	20%	20%
2	Assess feature set, business fit, user sentiment, and measurable impact.	Does the tool align with strategic goals and address documented use cases/jobs? Proceed to Tier 3.	Functional completeness and fit	30%	50%
3	Validate ROI, user adoption, and long-term value.	Is the tool a clear strategic fit with strong performance? Proceed to Tier 4 for final decision.	ROI, scalability, long-term value	50%	30%

4	Consolidate findings for actionable recommendations (Adopt, Renew, Deprecate, RFP).	Should the tool be adopted, renewed, deprecated, or subjected to an RFP? Deliver final decision.			

Tier Scoring

How to Score Each Tier

1. **Scoring Criteria**:
    a. Each tier uses a set of criteria, scored on a scale of **1 to 5** (1 = poor, 5 = excellent).
    b. Examples:
        i. Tier 1: Relevance, alignment, basic use case fit.
        ii. Tier 2: Business fit, user sentiment, features.
        iii. Tier 3: ROI, adoption, scalability.
2. **Calculating Tier Scores**:
    a. Add up the scores for all criteria in the tier.
    b. Example:
        i. Tier 1: If 3 criteria are scored 4, 5, and 3, the total = 12.
    c. Normalize the total score to a percentage: (Total Score / Max Possible Score) x 100

Weighting and Final Score Calculation

1. **Assign Weights to Each Tier**:
    a. Tiers contribute differently to the final score based on their importance:
        i. **Tier 1:** 20% weight
        ii. **Tier 2:** 30% weight
        iii. **Tier 3:** 50% weight
2. **Weighted Tier Scores:**
    a. Multiply the normalized score of each tier by its weight: Weighted Tier Score = Normalized Score x Tier Weight
3. **Final Score**:
    a. Add the weighted scores from all tiers: Final Score = Tier 1 Weighted Score + Tier 2 Weighted Score + Tier 3 Weighted Score

Example Calculation

Tier	Total Score	Max Possible Score	Normalized Score (%)	Weight (%)	Weighted Score
Tier 1	12	15	80%	20%	16

Tier 2	24	30	80%	30%	24
Tier 3	40	50	80%	50%	40
Total	-	-	-	100%	**80 (Final Score)**

Example Explanation

1. **Total Score**: The sum of the scores for all criteria in each tier.
    a. Example: In Tier 1, the total score is 12 out of a possible 15.
2. **Normalized Score (%)**: The total score expressed as a percentage of the maximum possible score.
    a. Example: In Tier 1, 12 out of 15 equals 80%.
3. **Weight (%)**: The relative importance of each tier in the final score.
    a. Example: Tier 1 contributes 20% to the final score.
4. **Weighted Score**: The normalized score multiplied by the tier's weight.
    a. Example: For Tier 1, 80% × 20% = 16.
5. **Final Score**: The sum of all weighted scores.
    a. Example: 16 (Tier 1) + 24 (Tier 2) + 40 (Tier 3) = 80.

Interpreting the Final Score

- **≥ 80%**: Strong recommendation for adoption/renewal.
- **50%-79%**: Further exploration or RFP needed.
- **< 50%**: Recommend deprecation or discontinuation.

Appendix

Glossary of Terms

- **Total Cost of Ownership (TCO):**
  The total amount spent on a tool over its lifecycle, including licensing, implementation, training, and maintenance costs.
- **ROI (Return on Investment):**
  A measure of financial gain achieved from a tool compared to its cost, expressed as a percentage or ratio.
- **KPI (Key Performance Indicator):**
  Metrics used to evaluate the effectiveness of a tool in achieving business goals, such as user adoption rates, cost savings, or productivity improvements.
- **Broad Adoption Tools:**
  Tools that impact >50% of the workforce or critical workflows, typically requiring in-depth evaluation due to their strategic importance.
- **Licensing Costs:**
  Recurring fees for using the tool, typically annual or per-user-based.

- **Implementation Costs:**
  Costs incurred to set up and configure the tool, including third-party services or internal resource allocation.
- **Training Costs:**
  Expenses related to educating users and administrators, such as workshops, eLearning, or documentation.
- **Maintenance Costs:**
  Ongoing costs for updates, support, and infrastructure needed to keep the tool operational.
- **Deprecation:**
  The process of phasing out a tool that is no longer viable, effective, or cost-justified.

Metrics & Criteria

The following metrics and criteria ensure that each technology is evaluated holistically for its business value, usability, and alignment with GTME objectives.

1. **Business Fit**
   - Alignment with GTM Enablement priorities (e.g., Learning, Performance Support, Change, Social, Coaching).
   - Contribution to organizational goals and strategic initiatives.
2. **Measurement**
   - Measurable ROI or cost savings.
   - Ability to improve KPIs like efficiency, adoption, or performance.
   - Success in solving identified use cases.
3. **Feature Set**
   - Completeness in addressing required functionalities.
   - Uniqueness or innovation of features compared to competitors.
4. **Ease of Use**
   - User-friendliness for end users and administrators.
   - Learning curve and training requirements.
5. **Scalability**
   - Capacity to grow with organizational needs.
   - Flexibility to adapt to future requirements.
6. **Integration**
   - Compatibility with existing systems and platforms.
   - Ability to enhance or complement the existing tech ecosystem.
7. **Cost**
   - Total Cost of Ownership (TCO), including licensing, maintenance, and training.
   - ROI compared to alternative solutions.
   - Fit within budget constraints.

8. **Redundancy & Deprecation**
    - Overlap with existing tools.
    - Potential to replace outdated or redundant technologies.
9. **Sentiment & Feedback**
    - Input from GTME stakeholders, end users, and business leaders.
    - Perceived value and adoption likelihood.
10. **Compliance and Security**
    - Meets regulatory, data privacy, and security standards. Ability to support organizational policies and governance needs.

Tiers

The technology evaluation process has four tiers to ensure a systematic and efficient assessment of tools.

Tier 1: Use Case Collection

What It Is:

- Identify what the technology does and how it fits into the organization.

Key Questions:

- What is the tool's primary function (e.g., Learning Management, Analytics, CRM)?
- How does it align with the EAR Framework (Enhance, Augment, Replace)?
- Which GTME product does it support (Learning, Performance Support, Change, Social, Coaching)?

Goal:

- Understand the tool's purpose, alignment, and unique use case.

Tier 2: Feature Set Scorecard

What It Is:

- Evaluate the tool against key business priorities using a scorecard.

Key Questions:

- Business Fit: Does it meet business goals?
- Metrics & Impact: Can it deliver measurable ROI or KPIs?
- User Impact: Sentiment and adoption likelihood among end-users.
- Feature Set: Does it meet functional requirements?
- Ease of Use, Scalability, Integration, and Cost.

Goal:

- Determine if the tool is worth further exploration or should be dismissed.

Tier 3: Business Impact (If Needed)

What It Is:

- Conduct deeper analysis for complex or strategic technologies.

Key Questions:

- Does the tool address all critical business and functional needs?
- Have we conducted pilot testing to validate usability and effectiveness?
- Have stakeholders provided feedback on adoption and satisfaction?
- Does it compare favorably to competitors in terms of features, cost, and scalability?
- Is an RFP process needed to explore other options?

Goal:

- Fully vet the tool to ensure it meets all needs before adoption.

Tier 4: Final Recommendation

What It Is:

- Make a decision based on all evaluations.

Key Questions:

- Does the technology meet all key business and functional requirements?
- Should the tool be adopted, deprecated, or rejected?
- What is the final implementation or deprecation plan?
- Are there alternative solutions we should explore?

Goal:

- Deliver a clear decision with actionable next steps.

Why Use These Tiers?

Each tier builds on the last to save time and resources by:

- Quickly dismissing low-value tools.
- Conducting deeper evaluations only when necessary.
- Ensuring decisions are data-driven and aligned with business needs.

GTME Product Definitions

1. Learning
   - Tools and resources designed to train and educate employees, partners, or customers.
   - Focus: Knowledge transfer, onboarding, and continuous learning.
   - Examples: Learning Management Systems (LMS), microlearning platforms, or certification programs.
2. Performance Support
   - Solutions that provide on-the-job assistance to improve productivity and efficiency.
   - Focus: Real-time guidance, task aids, or workflow enhancements.
   - Examples: Digital adoption platforms, in-app help tools, or process automation software.
3. Change
   - Tools to manage and support organizational or process transformations.
   - Focus: Driving adoption of new processes, technologies, or cultural shifts.
   - Examples: Change management platforms, communication tools, or analytics for adoption tracking.
4. Social
   - Platforms that enable collaboration and engagement among teams or external stakeholders.
   - Focus: Building networks, sharing knowledge, and fostering community.
   - Examples: Internal social networks, discussion forums, or content-sharing platforms.
5. Coaching
   - Solutions designed to support personalized feedback and skill development.
   - Focus: Guiding performance improvement through mentoring or structured coaching.
   - Examples: Coaching platforms, 1:1 feedback tools, or analytics for performance improvement.

Technology Primary Use Categorization

1. Analytics
   - Tools that collect, analyze, and visualize data to inform decision-making.
   - Focus: Business intelligence, performance tracking, and insights generation.
2. Collaboration
   - Platforms that enable teams to work together efficiently.
   - Focus: Communication, project management, and knowledge sharing.
3. Content Management
   - Systems to create, organize, and distribute digital assets or documentation.
   - Focus: Version control, accessibility, and centralized resource management.
4. CRM (Customer Relationship Management)
   - Tools to manage customer interactions, relationships, and data.
   - Focus: Sales tracking, pipeline management, and customer engagement.
5. Digital Adoption

- Solutions that simplify technology onboarding and usage for end users.
- Focus: Training, in-app guidance, and workflow optimization.

6. Learning Management
   - Platforms for delivering, tracking, and managing training programs.
   - Focus: Employee development, onboarding, and compliance training.
7. Performance Management
   - Tools to measure and improve individual or team performance.
   - Focus: Goal setting, feedback, and performance reviews.
8. Process Automation
   - Technologies that streamline repetitive tasks and workflows.
   - Focus: Efficiency, error reduction, and scalability.
9. Productivity Tools
   - Applications that enhance individual and team productivity.
   - Focus: Time management, task tracking, and collaboration.
10. Social & Community Platforms
    - Tools that foster engagement and communication within a group.
    - Focus: Networking, information sharing, and community building.
11. AI & Machine Learning
    - Technologies leveraging AI to automate, predict, or personalize tasks.
    - Focus: Advanced analytics, chatbots, and recommendation engines.
12. Change Management
    - Platforms to facilitate the adoption of new processes or tools.
    - Focus: Transition planning, communication, and adoption tracking.
13. Security & Compliance
    - Solutions ensuring data protection and regulatory adherence.
    - Focus: Risk mitigation, governance, and access control.
14. Communication Tools
    - Platforms for messaging, video conferencing, and internal announcements.
    - Focus: Seamless interaction across teams or stakeholders.
15. Coaching & Feedback
    - Tools to facilitate mentoring, skill development, and performance guidance.
    - Focus: Real-time feedback, skill tracking, and structured coaching.