

WHITE PAPER

Outsourced Product Development -Vendor Evaluation

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Globalization, increasing competition and the need for fast time-to-market has driven many product companies to engage in an outsourcing relationship. If you are a product development company searching for an outsourced product development (OPD) partner, this could serve as a guide for you. Quite often, it is simple to decide what....

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1. Introduction

Globalization, increasing competition and the need for fast time-to-market has driven many product companies to engage in an outsourcing relationship. If you are a product development company searching for an outsourced product development (OPD) partner, this could serve as a guide for you.

Quite often, it is simple to decide what and how much of a company's product development services should be outsourced, although it may be fraught with internal politics. However, it is rather difficult to decide to whom it should be outsourced. Evaluating a vendor becomes crucial; that too given the critical task of product development, which requires superior capabilities, and years of expertise.

This paper has been developed to serve as a guide for you when selecting an OPD vendor. It addresses things like what to look for, what to ask, and how to decode responses while evaluating an OPD vendor.

2. Evaluation Procedure

The final decision in selecting an OPD provider should be made only after a thorough analysis of the several characteristics that determine the suitability of the vendor for your product development.

This analysis must include feedback from the vendor's clientele, technical expertise of the vendor, financial stability and finally their experience in handling outsourced product development projects. Also, one should check the size and stability of the organization that is being considered for OPD. There are many ways to identify a potential partner.

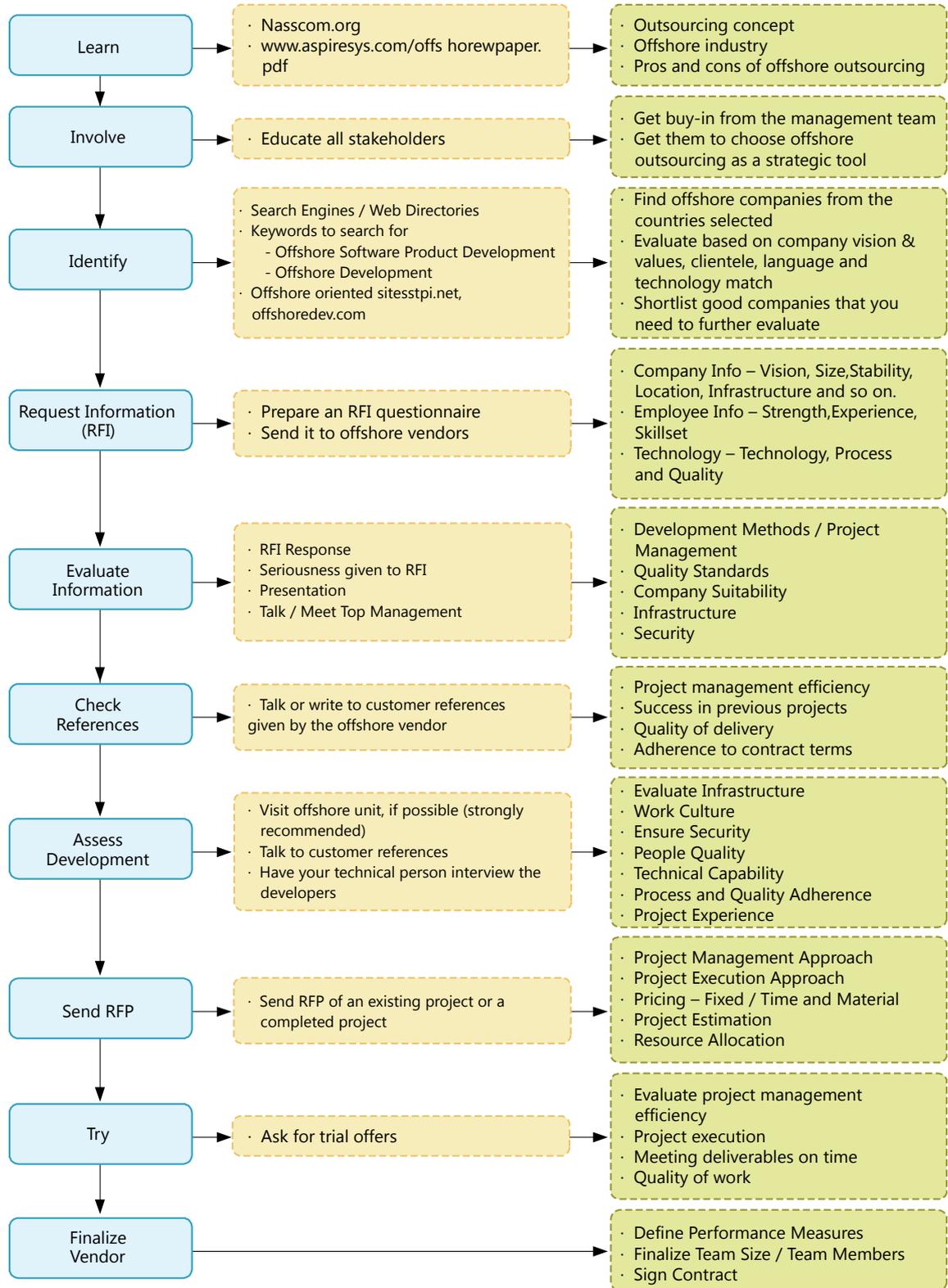
We have developed a step-by-step process for evaluating your outsourcing partner by carefully studying the evaluation methodologies of different companies. Although the conditions for evaluation differ from one company to another, there is no significant difference in the procedure for selection of vendor.

Simultaneously, we have built a process chart that would assist you in implementing the outsourcing process in a progressive manner.



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Evaluattion Process Chart





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3. Evaluation Criteria

There are numerous factors that influence the selection of the most appropriate OPD partner for your company. We have identified, assessed and substantiated these factors, specifying the level of significance in the overall evaluation. Comprehensively listed below are these factors based on three major categories – People, Process and Technology:

Factors	Parameters	Importance
Company Information		
Company Vision and Direction	Mission and Vision	* * * * *
Company Stability & Investment	Commitment, Experience, Customer relationship, Company growth, Financial Stability	* * * * *
Size of the Company	Relative size, Required team size	* * * * *
Location of the OPD Facility	Country, Language, Manpower abundance	* * * * *
Infrastructure	Power backup, Internet/Communication, Software/Hardware infrastructure, Networking infrastructure	* * * * *
Security	Intellectual Property security, Physical Security, Networking security	* * * * *
Culture	Timing flexibility, Learning, Intrapreneurship, Conducive environment	* * * * *
Flexible Contract	Schedules and deliverables, SLA & guarantees, Payment, Conflict resolution, Risk cover, Term, Expiration & Renewal	* * * * *
Pricing	Pricing, Price Stability, Hidden costs	* * * * *
Reputation	Project management	* * * * *
Employee Information		
Skillsets	Well rounded team, Team/Knowledge continuity, Training	* * * * *
People Quality	Quality programmers, Hiring policy, Experience	* * * * *
Retention Rate	Over the years	* * * * *
Technology Information		
Process	Domain expertise, Adaptability, Security, Sustainable architecture	* * * * *
Project Management	Project planning, Risk management Status communication, Reports	* * * * *
Software Development Process	Certification, Flexible process	* * * * *
Quality	Coding standards, Code reviews, Testing	* * * * *



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3.1 Company Information

3.1.1 Company Vision and Direction

Significance ★★★★★

Outsourcing represents a long-term, results-oriented relationship between two organizations. Such a relationship demands that there is harmony in vision between you and your vendor and shared goals. Understanding intangible factors, related to your vendor is as important as knowing the tangible ones.

Parameters:

- **Mission and Vision** – Analyze the vision of the OPD partner. Find out the business philosophy of the vendor including short-term, mid-term and long-term business goals. What does the OPD vendor's mission statement say? Is OPD their core focus? Answers to these questions will help you determine the focus of the vendor in OPD.

3.1.2 Stability & Investment

Significance ★★★★★

Product development is a very critical task and should be outsourced to a company only after investigations reveal that the company is capable of understanding the complexities behind product development. Outsourced product development is not the same as "Software application development". It is significantly different in terms of skill-sets, commitment and execution. The OPD vendor being evaluated should meet the standards and expertise required for software product development.

Parameters:

- **Commitment** – Outsourcing your product development effort involves an element of risk. Hence, it is very important to select a vendor who is highly committed to ensuring customer satisfaction and who has a stable business/strong financials or fundamentals. This can be done by checking on the company's history and speaking to existing customers.
- **Experience** – Find out whether the vendor has a proven reputation and the required experience in OPD. Evidence of such competencies can be obtained from their engineering and project management fronts. Ask for case studies to know about the type of products developed. This will help you find out whether the vendor is capable of handling product development projects of the size and nature that you require.
- **Customer relationships** – Customer satisfaction plays a crucial role in assessing the stability of a business. Contact the OPD vendor's past and existing clientele to get a first hand understanding of their work. Also get a clear picture about the vendor's clients, like their products, size, location and market value. This may help you arrive at the decision as to whether the vendor is the best fit for handling your company's development efforts.
- **Company growth** – You need to associate with a vendor who is growing and doing well. Ask for details about the company's growth in the past few years to understand the stability of the company.
- **Financial Stability** – The vendor that you engage for your development work needs to be self-sufficient with respect to cash-flows. Their financial figures will reveal this, as well as their scale of business and ability to expand.



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3.1.3 Size of the Company

Significance ★ ★ ★ ★ ★

Size of the company is an essential factor in evaluating an OPD vendor. Find out whether the vendor is the right partner for you in terms of its size, relative to yours. This becomes very crucial, as there are numerous instances of vendors who are bigger in proportion to your size, not giving your company/you sufficient attention. Your projects may not be given importance, as they would not fall in the target segment of these vendors. In case of vendors that are smaller in size, there is a possibility that they pull out resources from existing projects to attend to immediate requirements. This can delay your project delivery and result in dissatisfaction and less-than-optimum results. Hence, it becomes imperative on your part to ensure that the vendor has enough resources, and pays good attention to execute your projects in a timely manner.

Parameters:

- **Relative size** – Look for vendors that match the size of your company. Also, vendors may pay attention to you only if you contribute a minimum of 3-5% to their revenue. If you are going to contribute more than 50% to the vendor's revenue, that too in the initial stage, then you are running at high risk.
- **Required team size** - If you are looking for a team of 50 people, it is better to look for companies with the size of 200 to 300 people. For projects where you are looking for 100-200 people, you need to look for a company with at least 500 to 1000 people.

3.1.4 Location of the OPD Facility

Significance ★ ★ ★ ★ ★

Location of your OPD vendor plays a crucial role, especially in cases where you decide to go offshore. This is because outsourcing laws vary from country to country. For instance, a European Protection Directive doesn't allow personal data to be sent offshore unless the other country has equally strong laws or the contract explicitly includes measures for data protection. Hence, assessing the compatibility of outsourcing laws pertaining to your vendor's country of origin becomes imperative.

There are several countries like India, Israel, Russia, Ireland, Malaysia, Philippines, and China, where it is less expensive to set up offshore development centers. India occupies 80% of this market and it is advisable to consider India because it has the most experience in the offshore industry, and is also very well equipped to handle outsourced product development. Other countries are also growing now and are improving their communication skills, which has not been a point in their favor so far.

Parameters:

- **Country** – Choose an OPD vendor from a country that is tried and tested. This is essential because many countries do not have the necessary infrastructure to support the unique and complex needs of software product companies.
- **Language** - Common language to communicate is another important factor for outsourcing relationship. English is an official language in many offshore countries like India, Ireland and Pakistan. However, some countries do not promote English as a common language for communication. Hence, you might face difficulty in communicating your requirements and getting projects executed. Ensure that the country encourages a common language for oral and written communication that is known to you as well as your vendor.



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- **Manpower abundance** – Product engineering requires excellent product skill sets that may not be available in all countries. Hence, make sure that the country you are evaluating offers an abundance of skilled resources with the requisite knowledge base.

3.1.5 Infrastructure

Significance ★ ★ ★ ★ ★

It is essential to find out whether the vendor's infrastructure set-up like server specifications, telecom bandwidth, secure network facilities for unhampered interaction, backup facilities, Internet connectivity are all robust enough to ensure the continuous progress of the project along expected lines. Ensure that the vendor has adequate infrastructure backup to prevent disasters while developing your product.

Parameters:

- **Power backup** – Power shortage is an issue in many offshore countries. These countries usually need to arrange for additional resources to provide backup for power. You need to ensure that proper power backup is provided so that your project delivery time does not get affected.
- **Internet / Communication** – Again, Internet connectivity is an issue in some of the offshore countries. The vendor preferably needs to have multiple levels of backups for Internet connectivity like a leased line, broadband DSL, ISDN, etc. Typically, a software product development or testing outsourcing engagement involves a lot of data transactions. You need to ensure that the vendor has sufficient Internet bandwidth to facilitate such transactions.
- **Software/Hardware infrastructure** – It is definitely better to check for the availability of the required software and hardware environment necessary to execute your project, like the OS, databases, application servers, etc. before you engage the vendor for your projects. In situations where the infrastructure is not available, you need to ensure their capability to source them and set up the environment in a timely manner.
- **Networking infrastructure** – You need to understand the network environment in your vendor's organization and ensure that it is secure for your projects to be executed remotely.

3.1.6 Security

Significance ★ ★ ★ ★ ★

Engaging an outside firm to execute your development work means sharing valuable information about your product. Analyze the measures taken by the OPD vendor to safeguard your sensitive and confidential information. Look into the issues relating to the protection of your Intellectual Property (IP) rights, especially if the vendor is located offshore. In some countries, the Data Protection (IP) law is not exhaustive enough to take care of certain issues like loss of data, so it is very important to do your due diligence on this aspect.

Parameters:

- **Intellectual Property security (IP)** – The most important aspect of ensuring security is protecting your valuable IP. You need to ensure that the vendor does not duplicate or misuse your product information for his or her company. You need to get them to sign an agreement that covers IP protection issues, non-compete and non-disclosure terms.



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- **Physical security** – You need to enquire about the existence of a secure system like access card security in the vendor’s company to prevent the entry of strangers into the company’s campus. Networking security – Invention of sophisticated technology has only increased the fear of information being stolen. Hence, it becomes the top priority of the systems manager to set up a secure networking system. You need to talk to their systems manager to understand if they have proper hardware / software firewalls installed in their network.

3.1.7 Culture

Significance ★★☆☆☆

Outsourcing product development is directly tied to your vendor’s organizational culture and its ability to respond quickly to market conditions. Culture is a unique value that exhibits the practices of employees, the rites and rituals of daily work and procedures involved in product development.

Parameters:

- **Timing flexibility** – In case of an offshore vendor, you would be working with them on different time zones that demands late hours for you or your vendor. Your vendor should be willing to accommodate such late working hours.
- **Learning** – Newer technologies are evolving everyday in the software industry. You need to understand if your offshore vendor encourages learning within the organization and ensures that their product engineers are up to date with new technologies.
- **Intrapreneurship** – It is very essential that employees own responsibility for their work. They will not be able to deliver the best quality if they consider their work as accomplishing the task assigned to them. Ensure that your OPD vendor creates an environment that allows product engineers to own responsibility for their development work and take it to completion.
- **Conducive environment** - Employees need to enjoy a very cheerful environment for them to be able to deliver their best. Find out whether the vendor provides such an environment in their development unit.

3.1.8 Flexible Contract

Significance ★★★★★

Another critical thing about outsourcing is signing a very clear and flexible contract with your vendor

Parameters:

- **Schedules and deliverables** - The contract needs to clearly mention milestones, project deliverables and deadlines for each release. It is also important to ensure that contract terms for failures to deliver, penalties for late delivery, etc. are discussed and documented in the agreement.
- **SLA & guarantees** – The agreement needs to define standards that need to be met to measure development performance like acceptance test criteria, coding standards, etc.
- **Payment** – Make sure that the payment terms including payment cycle are well defined in the agreement.



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- **Conflict resolution** – Even the best business relationships encounter problems from time to time. Issues can arise from not specifying the requirements clearly, not asking enough questions, not meeting deadlines on time and so on. Be sure to spell out mechanisms so that each party can report problems to the other, and the means by which such problems may be formally addressed and resolved.
- **Risk cover** – It is important that you do not take very high risks while starting an outsourcing relationship. It is better to “TRY” the relationship before “COMMITTING” to the relationship. There are many outsourcing firms who make it easy for you to start, establish comfort levels, and then commit to a long-term relationship. You need to ensure that your vendor adopts a similar strategy to get you comfortable with offshore development and validate capabilities.
- **Term, expiration, and renewal** – Set a clear limit on the duration of the contract, and spell out the terms under which it will expire, and how it can be renewed. In general, it's better to require formal renewal in writing, rather than specifying conditions for automatic renewal.

3.1.9 Pricing

Significance ★★☆☆☆

Price is always a deciding factor in any purchasing decision. Although pricing in the outsourcing industry is very competitive, it varies from vendor to vendor. It is essential that you consider price along with all the other critical factors while choosing the right partner. Also, you need to ensure that your risk is reduced to the minimum possible while engaging an OPD vendor.

Parameters:

Pricing – There are two types of pricing in an outsourcing relationship. In one method, the pricing is based on an estimate of the project size. It is a fixed bid for a particular scope of work. For additional work, the vendor would estimate and come up with the additional cost. The other pricing model is based on time and material. In this case, the vendor charges you an hourly, weekly, or monthly rate depending on the agreement, and allocates dedicated resources, to whom you can allocate any of your projects. You need to choose a pricing model that is suitable for you.

Price stability – The pricing usually changes after a particular time period, say one year or so. Some vendors increase the price by more than 30% per year once you start working with them, and become dependent on their team. Hence, it is better to ensure that you discuss the annual percentage rise before finalizing the vendor.

Hidden costs – Some OPD vendors keep their pricing low while promoting their services till they get you to sign the contract. Later, they would produce an invoice with billing for separate services like documentation, project management time, etc. In case of a time and material contract, they may charge you additional amounts for overtime spent by their product engineers. Hence, you need to ensure that the vendor has an open pricing model and does not add any hidden costs to the invoice after signing the contract.

Significance ★★☆☆☆

3.1.10 Reputation

The success of a company is reflected in having satisfied customers and repeat business from such customers. Customers would want to continue business with the same vendor only when they get the best service. Hence, it is essential that you talk to current customers of the OPD vendor and understand the vendor's capability.



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Parameters:

Project management/Engineering – Analyze the project management and engineering skills provided by the vendor. This can be obtained from speaking to past or existing clientele. From the project management perspective, find out how well they analyze and determine project requirements and expectations up-front. Also find out from clients whether the vendor had the capability to deliver effective and innovative designs.

3.2 Employee Information

3.2.1 Skillsets

Significance ★★★★★

The lack of readily available skilled resources in countries like the United States is one of the primary reasons behind opting for offshore development. The availability of a large pool of skilled human capital in offshore countries brings in a wider choice of resources and flexibility in selection and hiring of team members. This, while keeping the associated cost structure low. A large available resource pool also paves the way for quick ramp-ups in team size that may be needed at any point in time.

Parameters:

- **Well-rounded team:** Examine the skillset available with the OPD vendor. Also, check if the resources have the knowledge and experience developing software products. Determine whether the team is well rounded with technical architects, usability engineers and so on. This can be achieved by scheduling an interview with the technical team.
- **Team / knowledge continuity:** There may be challenges that arise in terms of team-continuity. In a scenario where even the oldest versions of products, dating back years, need to be maintained and supported, knowledge of the old systems and their design considerations, needs to be continuous. A product engineering team cannot be quickly assembled together without painful knowledge transfer from existing resources, or a painful learning curve of existing design considerations. Hence it becomes imperative on your part to determine whether the vendor has a process to ensure knowledge continuity in case of attrition or team change.
- **Training:** Unlike application engineers, product engineers cannot be picked up from the market. They need to be trained on the “under-the-hood” aspect of software engineering. So, examine whether the vendor has strong training programs that transform software developers to product engineers.

3.2.2 People Quality

Significance ★★★★★

Obviously, product engineers are a different breed of software developers. They must have higher architecture and more under-the-hood engineering skills apart from the experience of developing software products. Today’s IT requirements have created umpteen number of programmers from different backgrounds; however, they do not have a basic foundation in software engineering. Many firms hire such people due to their low cost availability. Although they may be capable and intelligent, they cannot be allowed to handle your projects immediately, as their approach to the problem may be different from qualified product engineers. They may take longer to solve problems and may not follow the development process strictly. There have been many disasters in outsourcing relationships due to this factor. Many companies still continue to do this and have not learnt from their failures.



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Parameters:

- **Quality programmers** – Analyze the quality of people assigned to you by the OPD vendor. Schedule an interview with the technical team of the vendor. Investigate on the type of products designed/developed/validated in the past by the team members. Alternately talk to references with whom the product engineers have worked directly and get their feedback. Finally check the competency of the team members with respect to the features and functions of your product.
- **Hiring policy**- It is advisable for you to understand the hiring policy of the OPD vendor. You should ask about how programmers are selected and what criteria are considered - like education, aptitude / technical tests, interviews, etc. You also need to understand the standard against which your vendor benchmarks candidates while recruiting.
- **Experience** – It is important that you do not outsource your work to an amateur team. You need to find out the years of experience of the vendor’s development team. Ensure that the average years of experience of the development staff works out to at least 3 years.

3.2.3 Retention Rate

Significance ☆☆☆☆☆

Retaining good people must always be a top priority for any firm. This is especially true in the software industry where there has been a high turnover of people because of intense competition and numerous opportunities. Any good OPD firm has to keep looking for innovative ideas to attract and retain their best people.

Parameters:

- **Over the years** – The higher the retention rate, the better the company environment. Better productivity can be expected from a firm that retains the best talent. Find out the retention rate of the vendor and ensure that it is high.

3.3 Technology Information

3.3.1 Process

Significance ☆☆☆☆☆

Apart from experience and price, technical expertise plays a crucial role in determining the right OPD vendor. Analyze the technology related best practices such as sustainable architecture, usability engineering and adherence to coding and architecture guidelines followed by the OPD vendor. Technology keeps changing from time to time. In order to develop and maintain robust products that scale well into the future, you need to know if the OPD firm is technologically skilled to handle mission-critical scenarios.

Parameters:

- **Domain expertise** – Find out if the offshore firm has domain expertise in your technology areas. The capability to develop in your chosen technology, supported by good customer references, would enable you to qualify the vendor to the next step in the evaluation process.



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- **Adaptability** – Although it is good if a vendor has expertise in precisely your technology areas, it is not the most critical factor in case you require specialized skill sets. The ability of the product engineers to quickly learn the relevant technology is the most critical factor. This would demand that the product engineers have the necessary foundation in technology (example – Object Orientation, Database & RDBMS Concepts, good experience in fourth generation programming languages, etc.). Hence, ensure that the vendor has the basic capability to deliver quality projects.
- **Security:** IP and data security become paramount in a software product. With the advent of ASP or SaaS licensing models, many customers' data very often resides in a single database, sometimes the customers may be each other's competitors. Check the measures taken by the OPD vendor to protect your data.
- **Sustainable Architecture:** Ardent adherence to underlying architecture becomes mission critical in product engineering. Ensure that the OPD vendor's team adheres to the architecture standards while not losing sight of the functionalities.

3.3.2 Project Management

Significance ★★★★★

The importance of project management is very pronounced in case of offshore outsourcing. You need to ensure the existence of a clearly defined and professionally followed project management system in the vendor's development unit.

Parameters:

Project planning –Project delivery needs to be planned properly and estimated well to deliver on time. Examine the project planning activities of the vendor by referring to case studies and talking to clients. This would help you ensure that the vendor uses proper tools to manage the planning activity and meets milestones on time. Above all, find out who handles the project. Are they handled by experienced and successful project leaders/managers?

Risk management – It is imperative that the risks involved in executing a project are identified and assessed before starting the project. Project risks should be monitored throughout the lifecycle of the project and steps should be taken to alleviate them. You need to ensure existence of an efficient risk management system.

Status communication – You need to ensure that there is good communication maintained throughout the project duration. Regular meetings with the developers and project managers on pending tasks, and benchmarking the project status against schedules, ensures that any deviation is identified early on and corrective action can be taken.

Reports – There needs to be a proper reporting system that helps you keep track of project status. The report needs to be well made with respect to providing complete status of the project. Ask for sample reports and get a feel for the level of detail covered in the reports.

3.3.3 Software Development Process

Significance ★★★★★

The software product development process adopted by the OPD firm bears a lot of significance when choosing the right firm to entrust a project to. A well-defined process reduces the software development risk and allows the project delivery date to be rightly predicted. Also, managing a project becomes very simple when a standard process is followed uniformly throughout the organization.



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Documentation at every stage of the development cycle is another good thing about following a standard process.

Parameters:

Certification – There are Organizations like the International Standards Organization or the Software Engineering Institute (SEI – Carnegie Mellon University), which provide certifications like ISO 9000 and CMM to firms that follow standard processes. Companies with certification from these organizations strictly follow project development processes to ensure quality delivery.

Flexible process – Certification from these organizations is not the only factor in choosing an offshore company. Vendors may follow a different process that suits their company. Hence, you need to ask and understand if they follow a process that is suitable for your company. They should be flexible enough to accommodate any changes in their process to ensure that you are comfortable working with them.

3.3.4 Quality

Significance ★★★★★

Quality is the most significant and prime factor in offshore outsourcing as it deals with satisfying customer requirements. Some key parameters to improve and maintain competitive advantage in the OPD industry is to offer better services, more focused customer orientation, guaranteed quality in the end product and reliable delivery times by abiding to industry quality standards.

Parameters:

- **Coding standards** – Usually, organizations define their own coding standards for each programming language. You need to ensure that you are comfortable with the coding standards followed by the vendor. In case you have a specific standard that you want them to follow, they need to be flexible and adopt the same. You also need to understand their naming conventions and verify if all the programmers follow the same convention throughout their project.
- **Code reviews** – Understand the code review practices (like code walk-through) followed by the OPD firm. You need to know how they do their coding and whether the code is well documented for future upgrades and maintenance. A good practice is to ensure that pseudo-codes are written and approved by the module or project leaders before the actual code is written.
- **Testing:** It is essential that the OPD firm follows standard testing procedures at every stage of the development cycle to make sure that the end product is of high quality. Find out the level of detail they attend to while testing. The percentage of testing time in the development cycle will give you an idea of the level of importance given to quality.

4. Source

Having acquainted you with the critical factors that will influence your decision when evaluating an OPD vendor, we now outline some of the ways to find necessary information for the evaluation.

- Vendor's website
- Request For Information (RFI)



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- Materials like correspondence with vendor representatives, brochures, white papers, process documents, quality manuals and other documents from vendor.
- Vendor's presentation about company, work culture, development methodologies, etc.
- Talk with Customers, Partners, Project managers, Developers and System Administrators.
- Vendor's hiring policies and procedures
- Resumes
- Interview with programmers
- Project demo or source code sample
- Visit to the offshore development unit

Conclusion

At the end of the day, you don't buy an outsourcing relationship; rather it is something you develop over a period of time. So, it becomes essential that you try the vendor out with non-critical work before entrusting them with major development work. Moreover, offshore OPD is rewarding only in case of longer engagements and not for one-time projects. Successful outsourcing relationships are those that have been groomed over a period of time. However, you need to start somewhere. Hope you find this document helpful in making that start.

ABOUT ASPIRE SYSTEMS

Aspire Systems is an Outsourced Product Development firm committed to helping our customers build software products better and faster. We work with some of the world's most innovative Independent Software Vendors and software-enabled businesses, ranging from start-ups to established industry leaders, transforming the way software is built.

Aspire provides complete product lifecycle services, ranging from new product development and product advancement to product migration, re-engineering, sustenance and support. Our product development teams are spread between our Global Innovation Center in Chennai, India and offices in the United States.



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