

VI

The Trial Installation

"The first rule of intelligent tinkering is to save all the yam." Paul R. Erlich

This is a short chapter but an important one. Information Access Co. is the company often associated with introducing the concept of the trial installation in library marketing. The origin of the idea is not known, but a version of the technique was probably used when the first marketer of wheels allowed prospects to roll them around for a week or two.

A **trial installation** is the term used to describe the process which allows the potential customer to use the product or service for an extended period of time. Unlike consumer products, high-technology products require the customer learn how the technology works and discover through experimentation the usefulness of the product.

Information Access Co. turned to the trial installation to allow its library customers an opportunity to see first-hand how computer-based information products worked in the prospects' own libraries and offices. Be-

cause **IAC** has been an innovator, the trial installation was the most logical and helpful way for the company to introduce its videodisc product, its search interface to Dialog and most recently the company's **CD-ROM** products.

Success breeds imitators, and now most marketers of **CD-ROM** products provide some form of a trial installation program. The concept is entrenched as a basic technique in the vendor's marketing tool kit.

The Upside of a Trial Installation

There are a number of obvious benefits to a library which takes advantage of trial installation programs. Let's look at the most significant benefits:

- Staff and patrons get an opportunity to use the product for several weeks or months without obligation to buy.
- The pressure of making a decision about buying the product is deferred until more experience with the system, the information, and user acceptance is gained.
- Library personnel have an opportunity to learn more about the vendor's support programs and way of doing business.

Other advantages can be catalogued, but the key point is that one can learn about the product without paying for the privilege. These benefits are offset with some concerns as well.

The Downside of a Trial Installation

The risks of participating in a trial installation are minimal. However, it is important to understand that the vendor brings a set of expectations along with the equipment. Let's look at those often unspoken assumptions:

- The trial installation is an implicit sale. The vendor knows that by putting the product into the library, he has obtained a commitment from the prospect to invest time and resources into learning about the product. That investment of time and resources is not made lightly. Therefore, when it comes time to end the trial installation, the customer is often reluctant to let the product go out the door.
- Users become accustomed to the product and complain when it disappears. Vendors know that when library patrons become accustomed to the product, it is quite difficult for the library manager to take the product away from users. The vendor relies **onpatronpressure** to close the sale. Library management feels that it is inappropriate to remove a well-received and useful product.
- A successful trial installation spurs the library manager into action. The combination of investing time in learning the product and seeing patron acceptance energizes library management to find the money to buy the product. Vendors know that they have limited persuasive powers, particularly when compared with a patron or user community responding positively to the **CD-ROM** product. The library manager is not making the decision to ac-

quire hardware, software, and data without good reason and solid evidence. The justification of the purchase is made easier because there is proof that the CD-ROM meets needs.

- The trial installation gives the vendor's salespeople free access to library management and staff. The more complex the product installed, the more frequently the library will be visited by vendor support personnel, researchers, marketers, and technicians. The contacts can help ease the purchasing process.

Once one is aware of the rewards and risks of the trial installation, a library manager is ready to request a trial installation of a CD-ROM product.

Steps in a Trial Installation

There are five basic steps to think about when considering a trial installation:

1. Get a Demonstration

The CD-ROM vendor should provide a demonstration before you are required to make a decision to buy the product. The demonstration can take place at:

- A trade show.
- The vendor's offices.
- An organization which has agreed to demonstrate the vendor's product.
- In the library.

In our experience, the most desirable option is to have the vendor visit your location and bring the necessary equipment. This gives you the opportunity to see the **CD-ROM** in action without the headaches of setting up the configuration yourself.

The vendor should demonstrate many of the capabilities of the product that would have otherwise required time to unravel: downloading, printing, and complex searching.

If the demonstration cannot be held at your location, we suggest that you visit the vendor's offices or an organization which has purchased the product. The least desirable location to see a demonstration is at a trade show. Depending upon booth traffic and schedules, there may be insufficient time for you to learn about the product.

When the demonstration is over, resist any requests to give either verbal or written commitment of your intention to purchase the product. Indicate that you will think about your needs and how the product can help you meet those needs, and that you will contact the vendor. Request a copy of the current price list and the names of two or three customers in your area. Ask for a copy of the terms and conditions of the purchase and equipment specifications applicable to the product in which you are interested.

Take time after the demonstration to get the reaction of the staff or colleagues to the product. Evaluate the product based on the criteria discussed in *V The Product Arena*. Remember in this phase of the evaluation process you are deciding whether or not you want a trial installation. You are under no obligation to accept a trial instal-

lation at this point. Investigate a number of products in this way before you select one to try.

2. Set Up the Hardware

You have settled upon a **CD-ROM** for a trial installation, and you have arranged for the vendor to provide you with the hardware, software, and discs for the interval.

Have an area set aside for the **CD-ROM** workstation. Make sure that you have a surge protector or line conditioner. These devices help protect the vendor's equipment from power surges.

The vendor usually installs the equipment used for the trial period. If you are providing a **PC**, the vendor's technician will install the controller card, software, and drive. If the vendor is providing all of the components, the technician will plug in the equipment and make sure it works properly.

Try to get the vendor to provide you with a complete installation, commonly called a **turn-key system**. It is in your interest to get as much out of the trial as possible. Turn-key systems, as a rule, are easier for the vendor to get up and running quickly and to troubleshoot easily.

3. Install the Software

As mentioned in *IV Technology Essentials* the software that makes the **CD-ROM** work may come on the **CD-ROM** or on floppy discs for you to install. If a turn-key system is not provided, software installation will be necessary.

The first-time installation of a **CD-ROM** product can be confusing and frustrating. Ask the technician to walk

you through the software installation process. If you have to do it yourself, read the documentation first, leave yourself plenty of time, and keep the vendor's technical support telephone number close at hand.

In our experience, it's helpful to make notes about the specific steps installation requires. When you do the installation, you can follow your notes and use the vendor's documentation for more detailed points. We've also found that documentation does not always put the information about installation in one place. You may have to scan the documentation's table of contents, index, and chapter headings to be sure that you have a good picture of what's required.

Most software installation procedures require that you modify your `AUTOEXEC.BAT` and `CONFIG.SYS` files. You will find that you may have to call several sources for assistance during the software installation process. We have ourselves contacted the hardware vendor, `CD-ROM` vendor, Microsoft Corp., and individuals who had `PC` expertise. It is rare to find someone who has experience installing `CD-ROM` product software.

4. Train Staff and Users

The demonstration should help prepare you to use the `CD-ROM` without too much trouble. The products on the market today are designed with an unskilled searcher in mind. You should find that most products will not require extensive study or learning time. On-screen help and documentation are usually quite good.

Arrange two or three sessions for the staff to become familiar with the product. Over time, they will discover

and share among themselves tricks and short cuts. But initially becoming familiar with the information on the CD-ROM and the menu structure are most important.

It has been our experience that users require some form of training as well; otherwise, staff will be learning and working with individual users at the same time. One approach is to offer user training sessions which are brief and structured to cover the basics: searching and getting output. Heavy users may require one-on-one instruction.

Note the comments of the staff and users during the training sessions. Are there certain operations or procedures which are difficult to understand? Do users have trouble in developing a strategy? Now is the time to take into account all of the comments, both negative and positive. Bring those comments back to the vendor, who will be receptive to constructive criticism about the functionality and content of the product. You can influence the product and provide valuable feedback to the vendor.

5. Track Usage

As part of the ongoing cost justification for the CD-ROM and to measure the usage patterns that may affect your environment, keep track of usage data. (A sample **Usage Tracking Form** appears in Appendix A to this chapter.) Try to capture:

- Output preferences: printing or downloading.
- Time per user session.
- Waiting time per user.

- Maintenance requirements.

This information allows you to create a database about the use of the product you are about to acquire. It can be useful to identify heavy users who may be allies when searching for funds. (Some CD-ROM products provide usage tracking software as a separate software module.)

If the CD-ROM creates a bottleneck or a waiting line, it might be wise to start a reservations log. In general, blocks of time in 30-minute or longer intervals can be offered with advance notice of several hours. Be aware that some of the CD-ROM products operate slowly, so you may have to expand the time blocks to allow users to complete their research. When the machine is not reserved, walk-in patrons can use it until the next reservation slot. Include training sessions in the log.

Usage tracking forms and the reservation log should be kept at the reference desk nearest the machine. Locating these tools on the workstation itself virtually assures that they will be used as notepaper by the CD-ROM users.

6. Make a Decision

If you have not yet purchased the product or equipment, a three-month trial will give you sufficient time to make a purchase decision.

During the trial period take time to iron out any questions you or your organization's legal staff may have with the terms and conditions of the contract. Negotiate for a fair price and any renewal deals that can be made. If you are already doing business with the vendor, inquire about a discount.

Tips and Tactics

Here are a few tips and tactics you may find useful in managing the CD-ROM trial installation:

- Limit the number of trial installations that run at the same time. Vendors need your feedback. With a large number of simultaneous trials, you will have less time to devote to each product.
- Label the vendor's equipment and record the serial numbers. In the event of theft or damage, you will have this information at hand.
- Test all functions. During the trial, experiment freely. Should you inadvertently "crash" the system, the vendor's technical staff will be responsive in the hope that you will buy the product.
- Set ground rules for visits from the vendor. If you welcome unannounced visits, let them know. If, on the other hand, you require appointments which are scheduled three days in advance, tell them. The trial installation is often perceived as a guarantee of free access to you and your staff.
- Manage user access to the CD-ROM. Make certain that the equipment works and is reliable before exposing the installation to the public. In general, run the trial installation as a low-profile test to minimize the chance of making a commitment to purchase because of the wide exposure you give the system.

Appendix A: Usage Tracking Form

Date:

Name of staff member collecting data: _____

Shift or Hours of Operation _____

Number of workstation users _____

Number of user questions _____

Timespent helping CD-ROM users _____

Longest line waiting to use the CD-ROM at

8 a m **9 am** 10 am 11 am 12 p m

1 p m 2 p m **3 p m** 4 p m 5 p m

6 p m 7 p m 8 p m **9 p m** 10 p m

Photocopy requests generated by the CD-ROM on my shift. _____

Maintenance or repairs required.

Toner

Paper

Ribbons

Disc changing

PC maintenance. ~~Please~~ describe briefly _____

Other _____

Time spent on

Helping users _____

Maintenance _____

Comments or observations: _____
