

# Taking your migration to market

Choosing the right vendor strategy for major physical security projects

Our recent white paper, [Physical security systems migration considerations and scenarios: What to expect when refreshing your technologies](#), outlines the processes and risks facing security teams embarking on a technology upgrade. Here, let's take a deeper look at how you procure the work that must be done to make your migration successful.



## To bid, or not to bid?

As soon as you elect to update your physical security tech, you're faced with a primary challenge: Who will do the work to implement the new solution? You probably have a favorite integrator you work with... but are they up for the challenge? Maybe they've never performed a full overhaul of a client's system. Maybe their expertise pertains to some areas of migration but not others. Maybe it's unfeasible for them to perform migration work in all geographic areas where you have sites. Maybe they can't get you the best price.

Choosing an alternative vendor typically means issuing a request for proposals (RFP). This route can be appealing, or even inevitable, depending on various project factors. When choosing among vendors who are new to your organization, consider:

- + Do they have the required design and engineering competencies for your needs?
- + If you have multiple facilities, are their teams available to help in all locations?
- + Do you have current, accurate site documentation to share with them?
- + Do they offer any volume discounts in pricing or equipment?
- + Will their bid ultimately account for all of the risks in your migration project?

### Example RFP scenarios for systems migrations

#### 1. Preferred vendor, potential gaps in scope

You've already talked to the integrator who does most of your work, and they know you have a migration coming up. However, the site documentation—including equipment locations and statuses as well as individual programming details for each device—is sketchy at best. You haven't made it a priority to keep your as-builts up-to-date, so the integrator's work will be based either on institutional knowledge (if they're familiar with the work) or else discovering the state of things as they go along.

##### Possible approach:

- + Engage the integrator to do a site survey of your facility and update documentation.
- + Together with your security consultant, scrutinize and refine the migration scope.
- + If the scope exceeds the integrator's capabilities, consider taking the project to bid.

#### 2. Multiple campuses, multiple vendors

You have several facility types in different locations, comprising multiple campuses. In each location, you have a regional integrator who regularly performs work for you, but centralizing management to a single vendor is likely to improve the wholesale efficiency of your migration project overall.

##### Possible approach:

- + Work with your security consultant to review options for a global integrator.
- + Centralize management on behalf of the integrator as needed using your security consultant or in-house resources.
- + With your security consultant, determine the most suitable vendors to receive your RFP.

#### 3. High-complexity design & engineering

You're launching a migration that is likely to include a lot of invasive retrofit and re-cabling, which will produce lots of unknowns in your project schedule and potentially put your organization's business continuity at risk. Due to the extensive nature of the migration, you're concerned your incumbent integrator might not be equipped to handle these complexities.

##### Possible approach:

- + Plan a "rolling" migration: establish vendor rates up front, and design as you go along.
- + Require due diligence of your incumbent integrator to test their readiness to perform.
- + As needed, work with procurement and your security consultant to request external bids.



## Finessing your RFP

As you decide what effort to invest in your integrator search, remember this: If you author a good RFP, you're going to get a better price. Errors in foresight, either on your part or due to the vendors' incorrect assumptions, will translate into unanticipated mid-project expenses, and change orders are anathema to the cost predictability you seek to achieve. The more you can anticipate complexities up front, the less likely your migration is to be nicked-and-dimed into budget oblivion.

To help secure high-quality bids in advance of requesting them, consider these tactics:

- + Walk one or more of your sites with potential new integrators and let them ask questions about what they see. The more you demonstrate and disclose up front, the better you are protected against liability for surprises later on when the integrator pushes back on site conditions of which they claim to be unaware.
- + Take the time to update your site documentation in advance of the RFP, and make the updated data available to all participants. Again, this strengthens your position in case issues arise that the integrator fails to account for based on their awareness of your facilities' current state.
- + If your migration spans multiple geographies, leave the bidding open to regional integrators who can operate at each site without incurring travel expenses or off-shift work hour billing. Managing multiple vendors adds complexity, but can be the best approach in cases where location, capability, and pricing are optimized.

The notion of maximizing efficiency also carries over to the procurement process itself. If it takes too many people too long to agree on a vendor hiring approach, you're effectively spending a chunk of your budget before you even get the migration project off the ground. Coordinate with your procurement team and your security consultant to make the best use of everyone's time and shortcut where possible based on known and unknown conditions, as well as your security consultant's experience and knowledge of systems migrations.

## Leveraging volume

As you work on getting the best pricing from the integrators you talk to, you'll naturally look for ways to get bulk discounts on labor and materials. Some integrators will be better suited than others for this, depending on their size, their relationships with manufacturers, and their level of presence in the geographies where your migration is underway.

As you pursue volume pricing, make sure to watch out for a few pitfalls:

- + **Shore up the risk of supply chain disruptions and labor shortages.** Don't let your volume discount become a single point of failure in your project's success. Make sure your pricing discussions include contingency planning. Line up a Plan B with discounts in case your initial strategies don't work out—this helps yield a truer cost.
- + **Account for the “known unknowns.”** Migrations often proceed under less-than-ideal conditions, and the number one culprit is usually incomplete documentation about your site(s). Shore up this risk by only placing your bets on optimized pricing for equipment and labor you're certain will be required.
- + **Collaborate with your security consultant.** Effective migration planning depends on knowledge and input from a trifecta of sources: Your security team, your procurement team, and your security consultant. Work together to sanity-check the wisdom of all volume discounts that RFP respondents put onto the table, bearing in mind all nuances and contingencies that may apply.



## Budget strategy is not the same as bid review

The most solid budget strategies proceed from a maximum of data, and the budget you request for your migration must be based on true costs. The work you estimate for professional engineering is central to these costs, and should be considered alongside the detailed bids you receive. Minimize the overages that arise due to unanticipated work activities and hidden considerations that you and/or the vendor overlook.

As you receive RFP responses, work with your security consultant to rigorously evaluate each one and supplement as needed with any additional known costs associated with the work. This grand total, not simply the bottom line of the bid you ultimately accept, is the actual amount of migration funding you must request.

For these reasons, it's vital to put a realistic lens on the RFP responses you receive. The classic "rookie mistake" is picking the lowest bid because it's the one that best fits your budget. A lack of perspective on hidden costs greatly increases the chance of project failure, or at least a very bumpy ride.

As you review RFP responses, keep the following tips in mind:

- + A bid is more than just a number; it's a cumulative statement about a vendor's knowledge, accountability, and understanding of the project's risks. Read the whole response objectively—don't just flip to the last page to check the bottom line.
- + Weigh the context of every bid you receive. As much as you try to equalize the playing field, every vendor is different so it's never an apples-to-apples comparison. For each respondent, consider:
  - Do they have the right skills to meet your design and engineering needs?
  - What is their legacy knowledge of your environment?
  - What site documentation did they look at, and is it up to date?
  - What assumptions about scope are they making beyond what's in the RFP?



For more tips and detailed guidance on systems migration strategies, read our white paper [Physical security systems migration considerations and scenarios: What to expect when refreshing your technologies.](#)

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