



Solution-provider vendor checklist

Use this checklist to help you find the best vendor to provide solutions that best serve your unique business needs

You want to make sure you can build a productive relationship with the software vendor you choose so your investment in business software can yield the benefits you look for. Especially if your organization does not use a request for proposal (RFP) process, consider getting answers to the questions below from the prospective vendor and your software selection steering committee.

Vendor company

- Where is the vendor located?
- Where are its local offices?
- How many employees does the vendor have?
- How long has the vendor been in business?
- If the vendor is not independent, who owns the vendor's company?
- Who are the vendor's most important business and trading partners?
- What is the vendor's understanding of and vision for your industry?
- Does the vendor specialize in any particular software product or a specific software manufacturer's offerings?
- What horizontal or vertical market does the vendor focus on?

Vendor offerings

- What software products does the vendor offer? Ask the vendor to describe or provide specific information.
 - Does the vendor offer products developed by other software makers?
 - Are some or all of the vendor's solutions created by his or her own organization?
- What kind of hardware does the vendor provide? Ask the vendor to describe or provide specific information.
 - Servers and PCs?
 - Networking and communications devices?
 - Storage devices?
 - Mobile devices?
 - Any other?
- What services does the vendor offer? Ask the vendor to describe or provide specific information.
 - Customization?
 - Software development?
 - Deployment?
 - Training?
 - Maintenance and support?
 - Any other?

Vendor customers

- How many customers does the vendor currently serve?
- How many customers use the proposed vendor solution?
- Are any customers available as references for the solution the vendor is proposing?
- How many of the vendor's customers are in your industry and comparable in size and business requirements to your organization?

Vendor solution

- What is the name of the product?
- What is the current version number?
- How many current installations exist?
- How would you describe the solution?
- Are any enhancements for the solution already in planning?
- How does the solution stack up against your business requirements?
 - Strengths
 - Weaknesses
- Is the cost within your budget?
- How does the vendor's licensing model work?
- What is the feedback about the demo of the solution?
- Is financing available?

Solution implementation

- How does the typical implementation process work?
- Who performs the implementation?
- How long is implementation expected to take?
- What disruptions are possible?
- How can the vendor help make the transition easier?
- How can the solution interoperate with your existing, technical environment?
 - Hardware
 - Servers
 - Desktop computers
 - Software
 - Operating system
 - Business productivity software
 - Databases
 - Other applications
- How many of the vendor employees have certification or special training for this solution?
- How much training do your employees need to be proficient with the solution?
- How can the vendor validate and test the solution after implementation?
- How can the vendor remedy any problems or shortcomings?

The vendor and your organization

- Are business visions and company cultures compatible?
- What level of professionalism and responsiveness do your vendor employees display?
- How credible are the vendor's claims about the suggested product or solution?
- Can the vendor assist you in measuring return on investment and total cost of ownership for the solution?
- What makes this vendor a good fit with your organization?
- What distinguishes this vendor from the competitors you reviewed?
- Will the vendor be around in 5 or 10 years?
- What reservations about this vendor have members of your software selection steering committee voiced?