

## Email Marketing Key Questions to Ask Providers

### Company

1. How long have you been in this business?
2. How many clients have you sold? How many have you lost, and why?
3. What size or types of clients fall into your “sweet spot”?
4. What peripheral or support services do you offer (e.g., design, surveys, analytics, forms)?

### Products/Services

1. Is your solution offered as perpetual licensed software or on-demand multi-tenant solution?
  - If perpetual license:**
    - a. What are the hosting requirements?
    - b. What should I expect regarding upgrades?
    - c. Do you and/or third parties provide customization/implementation services?
  - If SAAS/ASP:**
    - a. Do all tiers include maintenance and support?
    - b. How often are new features introduced?
    - c. What do I do if I need a feature you don't have?
2. Is your solution optimized for enterprise level business or small to mid-sized business?
3. What ROI should I expect from implementing your solution?
4. What skills does my organization (or hired third party) need to implement this platform?
5. What technical support services are available? Do you have a support knowledge base, community forum, or applications that are shared by customers?
6. Which third party product technology eCommerce platform providers have you worked with in the past?
7. How do I ensure I own and control my data in the event I need to change platforms?
8. How do I import past data to ensure continuity when I launch your platform?

### Features

1. What key features are included in your solution?
  - a. What features are currently missing?
  - b. What features are on your roadmap?
  - c. What features does management love?
2. What is your product's competitive advantage over other email campaign packages?
3. What key features are geared toward big businesses? What about small and mid-sized?
4. Please describe how your solution complies with Can-Spam and other email regulations?
5. How do you work with ISPs to follow all the techniques to ensure high delivery rates?
6. How does your solution track email responses, invalid email addresses and issues with delivery of emails? How does it try to improve these for the next campaign?
7. Does your solution provide an HTML editor for creating new or modifying email templates?
8. Are your templates easily customized in both the editor and code views?
9. How do you support personalization of email as provided by other third-party providers?
10. Does your solution support any customer segmentation? Does it need a third party tool to identify segments? Can it use a third party tool?
11. Can your solution support multiple languages? For the same email?
12. How do you integrate into eCommerce sites? Sync with CRM data? Analytics? Other?
13. Please provide a list of CRM, analytics, financial systems, etc., for which you have standard integrations.
14. Do you support APIs for integration with other systems not currently supported by your standard integrations?
15. Please describe your customer data, types, what can be included on templates, and how this can be integrated or managed on your solution.
16. Please provide a list of standard reports, tracking and statistical tools included. In what timeframe do you provide reporting? Batch, real time, what latency? What type of creative and segment testing can your product support?

### Pricing

1. How is your solution priced? Number of emails sent? Size of lists? Number of domains, users?
2. Do you have overage costs?
3. Do you have contract timeframe commitments?
4. How do you charge for annual support? What about maintenance?
5. Are there any hidden fees (e.g., image hosting, size of lists, monthly overages)?

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