

## Gift Card/Certificate 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 left your company, and why?
3. What size or types of clients fall into your “sweet spot”? Won any awards in that space?
4. What peripheral or supporting services do you offer (e.g., technology, creative design, fulfillment, reporting, industry legal updates)?

### Products/Services

#### If perpetual license:

- a. What are the hosting requirements?
- b. What should I expect regarding upgrades (both timing and pain)?
- c. Do you provide customization/implementation services?
- d. Can outside third parties provide customization/implementation?

#### 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 or plan to have soon?
1. What optional services do you provide as part of your solution?
2. How long to implement a basic or sophisticated solution?
3. Does your solution integrate to all of my channels? What can't be integrated?

4. Which third-party product technology eCommerce platform providers have you worked with in the past? Please describe your process.
5. What optional services do you provide as part of your solution?
6. What ROI should I expect from implementing your solution?
7. What type of training do you provide to use your solution?
8. What skills does my organization (or hired third party) need to implement this platform?
9. What technical support services are available?
  - a. Are there human beings I can reach during reasonable hours (chat or phone) or do I have to wait over 24 hours for an email response or callback?
  - b. Is your support team located in the US or abroad?
10. Do you have a support knowledge base, community forum, or applications that are shared by customers?

### Features

2. What key features are included in your solution?
3. What is your product's competitive advantage over other packages? Why?
4. Can your solution provide the ability to use offline gift cards to purchase online and offline?
  - a. How do you make sure the card is not used offline and online at the same time?
5. Do you provide the actual production of the gift cards or is it done by another company?
  - a. Are there any minimum quantities or gift card amounts? Any maximums?
6. What are the different fulfillment options for delivery of the gift cards to the customer?
7. How do you prevent fraudulent use of cards?
  - a. Does this include card duplication prevention?
- b. Do cards need to be authorized to work? Can this be restricted to managers?
8. Do you have online tools to allow customers to view the value of the card?
  - a. Can it be customized for my look-and-feel?
9. What is the process used to activate the gift cards?
  - a. Can this be processed in batch for mass activation of cards?
10. What information do you track with gift cards?
  - a. Customer information and demographics, purchase history, etc?
11. What type of reporting do you have to track the gift cards?
  - a. Do you have analytical reporting as well?

### Pricing

1. What is the license fee (if perpetual license)?
2. What are the pricing schedules and what features do they include (if SAAS/ASP)?
3. How do you charge for annual support? What about maintenance?
4. Are there any hidden fees (e.g., implementation, transaction costs, revenue sharing)

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