

Loyalty and Promotion 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”? Won any awards in that space?
4. What peripheral or supporting services do you offer (e.g., technology, SEO/SEM, creative design, photo shoots)?

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 (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?
2. What optional services do you provide as part of your solution?
3. How long to implement a basic solution? A sophisticated one?
4. What ROI should I expect from implementing your solution?
5. What type of training do you provide to use your solution?
6. What skills does my organization (or hired third party) need to implement this platform?
7. What technical support services are available?
8. Do you have a support knowledgebase, community forum, or applications that are shared by customers?
9. Which third-party product technology eCommerce platform providers have you worked with in the past?

Features

1. What key features are included in your solution?
 - a. What features are currently missing, on your roadmap, does management love? What about shoppers?
2. What is your product's competitive advantage over other packages? Why?
 - a. Price? Dashboard? Ease of use? Flexibility? Don't say “all of the above”.
3. Please describe your philosophy on increasing customer loyalty.
 - a. How do you help me achieve this?
4. What information do you need to determine and manage customer groups for loyalty and promotions?
 - a. Where do you need to get this information (e.g., eCommerce, analytics, CRM applications)?
 - b. Is this feature available in your solution or externally fed into your system?
5. How will I know whether your solution is improving my profitability and customer lifecycle value?
 - a. How will I be able to use your system to improve these?
6. How does your platform integrate with other loyalty or promotions systems (eCommerce, CMS, analytics and back-office)?
 - a. Please list the applications for which you have standard integrations already built.
 - b. Please list the applications where you have built custom integrations.
7. Do you have a management console? Features?
 - a. Is it web-based, application-based, other?
8. Do you have reporting and a dashboard?
 - a. Please describe the reporting capabilities and how your solution can determine effectiveness of loyalty and promotions.
 - b. Please provide a list of standard reports.

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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