

Online Support/Demo/Chat Key Questions to Ask

Company

1. Are you primarily a technology provider or do you also provide outsourced services? Can I use one and not the other?
2. How many clients have you sold? Lost, why?
3. Is your solution geared more toward enterprise, mid-market or the SMB space? What types of clients fall into your “sweet spot”?
4. What other services do you offer?

Products/Services

1. Is your solution offered as perpetual licensed software or on-demand SAAS solution?
 - a. Do you provide customization /implementation/integration services?
 - b. What features do I lose by not subscribing to a higher tier?
 - c. What do I do if I need a feature you don't have or plan to have soon?
2. Outsourced call center: how does your model work? Is it domestic or offshore?
 - a. How much time/effort will be required on our part to train your people?
 - b. How will our company institutionalize the knowledge that your CSRs gather?
3. Do you provide services to evaluate and improve the customer services based on data generated from my websites and/or industry benchmarks?
4. How long to implement a basic solution? A sophisticated one?
5. What ROI should I expect from implementing your solution?
6. What type of training do you provide?
7. What skills does my organization (or hired third party) need to implement this solution?
8. What technical support services are available? What is your SLA for support services?
 - 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? Are they in the US?
9. Do you have a support knowledge base, community forum, or applications that are shared by customers?
10. How do I ensure I own and control my data in the event I need to change platforms?

Features

1. What key features are included in your solution?
 - a. What features are currently missing, on your roadmap, does management love?
2. What is your product's competitive advantage over other customer support solutions? Why?
 - a. Comprehensive approach? Deep database? Sophisticated algorithms?
3. Please describe your philosophy on increasing customer satisfaction.
4. Is your service a replacement for my existing solutions or do you integrate them?
5. How much performance improvement is automated vs. manual?
 - a. How much monthly time should I spend on optimization efforts?
6. How much content creation (whether demo, chat scripts, persona profiles, etc.) will I need to create in order to make this effective?
7. Do I have to completely re-organize my databases in order to use your product?
8. How many transactions per month does my website require before your statistical algorithms become valid?
9. How does your platform integrate with other systems?
 - a. Please list the applications that you have standard integrations already built.
 - b. Please list the applications where you have built custom integrations.
10. Do you have a management console? What can I manage with it?
 - a. Does it include reporting and a dashboard?
11. Please describe your reporting capabilities
 - a. How does your solution can determine effectiveness of loyalty and promotions?
 - b. Please provide a list of standard reports.

Pricing

1. How are you priced? Concurrent licenses, page views, number of transactions?
2. Are there any hidden fees (e.g., implementation, transaction costs, overages)?
3. Please provide an estimate of my total annual cost for your service, including an ROI model. How many transactions or incremental sales improvements will I need to justify this investment?

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