

## Personalization 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. Is your solution geared more toward enterprise, mid-market or the SMB space?
4. What peripheral or support services do you offer (e.g., data mining, content management, analytics, SEM, consulting/implementation)?

### Products/Services

1. Would you characterize your solution as a comprehensive bundle that includes technology, analysis and implementation or, more narrowly, as a hosted application that requires that I provide much of the content and effort to make it valuable?
  - If comprehensive:**
    - a. Exactly what professional services (e.g., strategy, segmentation analysis, implementation) do you provide?
    - b. How complex is the launch cycle process? What specialized skills are needed from my company? How much prior data do we need to make personalization effective?
  - If hosted application:**
    - a. What do I have to do to make this work?
    - b. What internal IT skills are required? How does support work?
2. How many transactions per month does my website require before your statistical algorithms become valid? How many orders per product?
  - a. Can I import past order history, web analytics, etc?
3. What technical support services are available?
  - a. Is your support team located in the US?
  - b. What is your SLA for support issues?
4. Do you have a support knowledge base, community forum, or applications that are shared by customers?
5. How can I export data in the event I need to change platforms?
6. How do I ensure I own and control my data in the event I need to change platforms?
7. Do you evaluate customer behavior based on data generated from my websites only or do you aggregate a wider base, including data from your other customers?
  - a. What about consumer behavior on websites that are not your customers?

### Features

1. What key features are included in your solution? What features are currently missing or are on your roadmap?
  - a. What features does management love? What about customers?
2. Where is your product's competitive advantage over other personalization packages?
  - a. Mathematical algorithms? Access to a wider database? Third-party support? Price? Ease of use? Don't say "all of the above".
3. Following implementation, how much performance improvement is automated vs. manual?
  - a. How much monthly time should I spend on optimization efforts?
4. Is your service a replacement for my existing eCommerce features? How do you integrate with them?
5. How does your platform integrate (functions and data) with search, eCommerce, and analytics? Please list your standard and custom built integrations.
  - a. Do I have to completely re-organize my eCommerce data in order to use your product? If not, how does it work?
6. Do you have a management console?
  - a. Does it include reporting and a dashboard?
7. Please describe your reporting capabilities (batch vs. real-time, ad hoc, etc.).
  - a. How do I ensure the data does not conflict with other systems?
  - b. Please provide a list of standard reports.

### Pricing

1. How are you priced? Flat fee, support fee, variable by usage?
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 much will I need to improve sales in order to justify this investment?

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