



# BE A SAVVY ECM CONSUMER

## Questions to ask your vendor

It is very likely that more than one enterprise content management (ECM) vendor will be able to meet the functional requirements you outline in your Request for Proposal (RFP). This document is intended to help you make an informed choice by providing you with a set of questions designed to give you a clear understanding of exactly what it is you are buying.

# Take a long-term view of the “price” of the solution

The purchase you are about to make is a long-term commitment, not just to the vendor, but also to the product or products used to create your solution. You should be confident that the decision you make now is also the right decision for the future and that the total cost of ownership (TCO) meets your expectations. The questions we suggest you ask focus on three areas: the **cost to create**, the **cost to operate** and the **cost to change your solution**. The answers you receive will help you make the best decision for your organization.

## 1 THE COST TO CREATE

### Up-front costs

- What are the implementation costs?
- Can you outline these costs and explain each of them?
- Do you offer different licensing options?
- Do you offer named (dedicated) licenses and concurrent (shared) licenses?
- Do you provide the option to subscribe to or lease the software and support?
- Do you offer the ability to dedicate licenses to a particular group for guaranteed access?
- Which of these options do you think is best for my organization and why?

### Determining the amount of customer code or scripting required

- Will my solution require the creation of custom code or the development of custom scripting?
  - If so, why is it required?
- Which parts of the software require code or scripting skills to configure?
- If there is custom code, who will create the documentation and provide training on this?
- What level of expertise will I need on staff to support this?
- How does the custom code affect an upgrade?
- Who is responsible for maintaining and supporting the custom code?

### Implementation success rates

Note: this step can often be validated by industry analysts.

- How many failed implementations of the product have there been?
  - Ask for specific details as there may be valid reasons

## 2 THE COST OF OPERATION

### Maintenance costs

- What is the maintenance rate and what's the value?
- What specifically is included in my maintenance?
- What is your maintenance renewal rate with your existing customers?

### Investigate the level of expertise you will need on-hand and the level of support you can expect

- What type and level of technical support will we require on staff?
- What's covered and what's not?
- Will we be assigned a dedicated team?
- Can you provide references?
- What level of expertise will we need in-house?
- How much ownership will we have over your solution? Can we make changes ourselves?
- What level of support is provided for upgrades?

### Test and Development environments

- Do you charge for duplicate licenses for a test and development environment?
- Do you charge support and maintenance fees related to test and development environments?

### Determine if you have to purchase additional software to secure, encrypt and protect the data stored in the system(s)

- How can I secure my data with your software?
  - At rest?
  - In motion?
  - When accessed?
- Is this native functionality or do we need to install another product?

## 3 THE COST TO CHANGE

### Upgrades are a significant consideration during the life of your solution

- Will I ever have to pay for an upgrade?
  - If so, why?

### Some vendors have a history of delivering an entirely new product as an "upgrade," requiring a migration of your data

Request a history of the vendor's product road map to set your expectations for the future of your solution.

- How many times have you required a "new implementation" at point of upgrade?
- What can I expect regarding this in the future?

### Some solutions require you to upgrade multiple products

There are instances where vendors build solutions using a portfolio of acquired products. Often, these products have unique server infrastructures, development release cycles and require the creation of custom code to pass data between them. Find out exactly what products you are purchasing and how much custom code will be in place to allow these to communicate. This impacts your upgrade process.

- How many different products make up your solution?
- Can you show you the "release cycle" for each of them?
- How much custom code will be required to "connect" these applications?
- How much custom code will need to be tested during the upgrade?
- Who's responsible for testing the custom code?
- Can we perform an "incremental" upgrade, allowing us to run two versions of the software in parallel at the same time to minimize potential impact?
  - If not, why?

### Technology will continue to evolve. Be confident that the product(s) you purchase will keep up.

Find out if the vendor has a track record of keeping up with advancements in your industry and in technology, such as compatibility with new operating systems, browsers and devices.

- How long between releases of new versions of your product? Why?
- Can you provide proof that you have invested in innovations with your products?
- Do you have a cloud offering and how easy would it be to migrate in the future?
- If this is a cloud solution, what if I want to move my cloud solution on premises?
- What innovations have you made with your products in cloud, case management, mobility and integrations?
- Will I have input into the product roadmap if I have a good idea? Can you prove this with examples?

### Look for the ability to scale to more users and departments

- When I want to scale to add more users, how will I do this?
- What are the upper thresholds of usage/connected users in the system?
- How easy is it to expand this solution to other departments?
- Can multiple departments share the same configuration of “document types” and “keywords”?
- Will I have to re-architect the solution if I don’t think of everything now?

We encourage you to ask these questions to all the vendors you are evaluating in order to make the most informed choice. To learn more about ECM and choosing the best vendor for you, visit [OnBase.com](http://OnBase.com) »



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