



CHOOSING A CONTENT SERVICES PLATFORM

Questions to ask your vendor

A guide to identifying not only **what** the product can do, but **how** it does it

OnBase[®]
by Hyland

Congratulations on taking the first steps to make your organization work better, smarter and faster.

It is likely that more than one vendor for content services platforms will be able to meet the functional requirements you outline in your Request for Proposal (RFP). This document provides you with a set of questions designed to help you achieve a clear understanding of exactly what it is you are buying so that you make an informed choice.

Take a comprehensive look at the “price” of the solution

This purchase is a long-term commitment, not only to the vendor, but also to the product (or products) used to create your solution. You need to be confident that the decision you make now will continue to be the right decision down the road. One way to do that is by making sure that the solution’s total cost of ownership (TCO) meets your expectations.

The following questions focus on three areas that contribute to TCO: The cost to create, the cost to maintain and the cost to change your solution. The information you gather from vendors by asking these questions will help you make the best decision for your organization.

The cost to create

Up-front costs

Look beyond the initial price quoted for the software. Each vendor has a unique approach to licensing models, subscription options and implementation fees – all of which impact your return on investment (ROI).

What are the implementation costs and how do you calculate them?

Do you offer different licensing options, such as named (dedicated) user licenses or concurrent (shared) licenses?

Yes No

Which of these options do you think is best for my organization's needs and why?

Do you provide an option to subscribe to or lease the software and its related support?

Yes No

The amount of custom code or scripting required

The more custom code required to create your solution, the more expensive and complex it will be to own in the long run.

Will my solution require custom code or scripting? Yes No

If so, which specific functionality in the software requires coding or scripting?

Who will create the documentation and provide training on this?

Who is responsible for maintaining and supporting the custom code?

What level of expertise will I need on staff to support this?

How is custom code handled during an upgrade?

The cost to maintain

Maintenance costs

If you are purchasing the software outright, you should expect to pay ongoing maintenance costs. Make sure you understand the value you will receive.

What is the required maintenance rate and what's the value of paying maintenance?

What, specifically, does my maintenance include?

What percentage of your existing customers renew maintenance each year?

Technical support provided by the vendor

While every vendor provides technical support, the quality, expertise and responsiveness will vary greatly.

What is covered by technical support and what is not?

Will we be assigned a dedicated support team?

What support can we expect during upgrades?

Can you provide customer references for your technical support?

Yes No

The cost to maintain (CONTINUED)

Level of expertise you will need on staff

Every solution will require some internal resources, but the skillsets required can differ drastically depending on how the product is designed.

What level of expertise will we need in-house to maintain the solution?

How much ownership will we have over your solution?

Can we make changes to the solution ourselves? Yes No

Test and development environments

You will need non-production environments to test upgrades, experiment with new functionality and diagnose technical issues.

Do you charge for additional or duplicate licenses for test and development environments?

Yes No

Are there support and maintenance fees related to test and development environments?

Third-party software required to secure, encrypt and protect your data

Not all software includes the native ability to adequately secure and protect your data.

Will we have to purchase or install additional software to secure and encrypt our information?

Yes No

The cost to change

Upgrade costs

To ensure you have the most up-to-date features, stay compatible with your IT environment and continue to protect your information, you will need to take advantage of system upgrades.

Will we ever have to pay for an upgrade? Yes No

If so, why?

Occasionally, vendors will completely re-write or re-architect their software product between versions. When this happens, an “upgrade” to the new version requires a new deployment and installation and a migration of your data.

How many times have you required a “new implementation” upgrade?

What can I expect regarding upgrades in the future? Are there any plans to re-architect this product?

The number of different products used to build this solution

Some vendors build solutions using a portfolio of products. Often, these products have unique server infrastructures and development release cycles and require custom code to pass data between them. This directly impacts your upgrade process.

How many different products make up the proposed solution?

Does each of these products have unique deployment considerations?

How much custom code will be required to pass data between these applications?

Are all of these products on the same development release cycle? Yes No

Can we mitigate risk during the upgrade process by running two versions of the software simultaneously (e.g., upgrade one department at a time)?

Yes No

The cost to change (CONTINUED)

Innovation and development lifecycle

Technology continually evolves. You should be confident that the product(s) you purchase will keep up with industry advancements and innovations in technology while keeping you compatible with new operating systems, browsers and devices.

How long is the wait between releases of new versions of your product?

Can you provide examples of recent major enhancements or innovations (e.g., cloud, case management, mobile, file sync and share, and integrations)?

Will I have input into the product roadmap? **Yes** **No**

Can you share any examples of how you've incorporated customer feedback into new releases?

Ability to scale to more users and departments

As your organization grows and changes, your solution must be able to grow with you.

How easy is it to add new users from both a licensing and administration standpoint?

What are the upper thresholds of usage and connected users in the system?

One platform
Unlimited potential

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