Software Purchasing Checklist

Questions to ask before making a purchase

Contracts

- ☐ **1.** Is there a contract and what are the terms and conditions?
    - ☐ **a.** Is there an auto-renewal clause?
    - ☐ **b.** Is there a warranty clause?
    - ☐ **c.** Is there a cancellation clause?
- ☐ **2.** When does the software maintenance annual period begin?
    - ☐ **a.** When the purchase order is issued?
    - ☐ **b.** When the installation is complete?
    - ☐ **c.** When customer signs acceptance document with vendor or their reseller partner?

Vendor policies

- ☐ **1.** Is there a policy for reducing license counts?
- ☐ **2.** Will reducing license counts reduce your annual maintenance costs or do they lock you in to your initial purchase forever?
- ☐ **3.** What is the process to change the reseller/partner if you are unhappy with them? Do you write a letter to the vendor?
- ☐ **4.** If you don't pay your renewal on the due date, what happens? Do they stop providing technical support? Do they deny access to any customer portals?

Vendor Transparency and Communication

- ☐ **1.** Will the vendor keep you updated on modules they are discontinuing?
- ☐ **2.** Will the vendor offer free license exchange for a license that they discontinue?

☐ **3.** Will the vendor alert you of new policies that affect you, such as no longer allowing reduction in licenses?

☐ **4.** Will the vendor notify you when they change offerings or reduce costs? For example, if you are paying a subscription for 25 users and they now offer 100 users for the same price, do they alert you or just let you continue to pay for the 25 licenses?

☐ **5.** How has the sales process been? Do you feel that the company is customer focused or revenue focused?

☐ **6.** Has the vendor provided you with references and been open to helping connect you with other end users?

☐ **7.** Has the vendor provided pricing easily or do you feel that it has been a struggle to get a straight answer on the costs?

Support and Maintenance

☐ **1.** Will you have a dedicated person to call, send an email or enter your issue into a ticketing system?

☐ **2.** What is the response time the vendor commits to?

☐ **3.** Does the vendor charge extra if you do not allow remote access?

☐ **4.** What is the cost for upgrading? Is it a professional services engagement?

☐ **5.** Does the vendor have a set hourly cost for upgrades or issues that are outside the technical support?

Customer Service

☐ **1.** Has your account manager been technical enough to be able to answer basic inquiries or are you waiting for someone technical to address your questions?

☐ **2.** Will there be a customer portal and/or forum to help you with your solution?

☐ **3.** How will the billing work? Will they invoice you months ahead of your renewal date and expect payment way before your renewal due date?

☐ **4.** Are there training videos and good documentation to get you onboarded quickly or is this at an extra cost?