

Annual Software Maintenance and Support Evaluation Checklist

Things to look for when you receive your annual renewal quote/invoice

Annual maintenance and support for On-Premise (Non-subscription)

1. Check the quote/invoice very carefully. It should be clear what they are billing you for.
 - a. Normally vendors bill a percentage of the software purchased. For example, if you purchase \$100,000 of software, they will bill you a percentage of that every year to cover upgrades and break/fix support. The percentage you are paying should be clear.
 - b. Are there additional line items with costs for extra hours? Many vendors promote companies purchasing extra support hours. I have seen where a company/agency purchased x number of hours because of a new project or new employees. When their renewal came through, the vendor put those hours on the invoice. I have seen numerous government agencies ready to pay invoices, until I point out the extra line items and ask them if they need those extra hours again. **The downside is that they expire. It would be much more valuable if the hours that are not used get carried over to the next year.**
 - c. Is there an additional support fee listed? I have seen vendors that list an extra support fee and if you don't pay that fee then you don't get support at all. (See line item number one and what it gives you.) .
 - d. Are you able to decrease licenses or remove items from your renewal? For example, if you have a \$5000.00 module and are paying \$1000.00 per year in support, you may want to remove that if that module is no longer being used.
 - e. Who is supporting you? Is it a reseller or the software vendor? Make sure you have clear lines of communication for when you need support.

ANNUAL SOFTWARE MAINTENANCE AND SUPPORT EVALUATION CHECKLIST

Things to look for when you receive your annual renewal quote/invoice

Annual maintenance and support - Subscription

1. What are the terms offered? What are the consequences if you want to terminate before your subscription ends?
2. Can you change your subscription/decrease licenses upon renewal?
3. If you do not pay by the expiration date, are you locked out of the application?
4. What are the options if you want to switch from on-premise to cloud or vice-versa? Is it an entirely new purchase or do they offer credit for what you have already paid?

Additional Notes:

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. Is any help included in the subscription pricing – i.e. setup, customization, scope of work?
5. Does the vendor have a set hourly cost for upgrades or issues that are outside the technical support? Is the support versus professional services clearly defined?
6. 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?
7. Are there training videos and good documentation to get you onboarded quickly or is this at an extra cost?