

Subscription Software Purchasing Checklist

Questions to ask before making a purchase

Contracts

1. What are the contract specifics?
 - a. What is the minimum term of your subscription?
 - b. If your subscription is for 100 licenses at x number of dollars, and they decrease pricing, do they give you the new pricing or are you locked into the old pricing for the terms of the subscription?
 - c. Is there an automatic renewal clause?
 - d. How much notice do you have to give to not renew/terminate? Do they charge you to get your data exported?
2. What happens to your data if you pay late or don't renew?
 - a. Are you locked out of your data and documents?
 - b. Do they charge you a reinstatement fee?
 - c. Do they cease all support on expiration date?

Vendor policies

- ☐ 1. Can you change your subscription/decrease licenses upon renewal, or do they lock you in to your initial purchase? (Vendors are always fine with adding licenses, but not when you want to decrease)
- ☐ 2. Who is supporting you? The vendor or their partner?
- ☐ 3. What is the process if you wanted to change from on-premise to cloud or vice-versa? Does the subscription price remain the same?
- ☐ 4. If you already own perpetual licenses, and the vendor changes to subscription-only, are you affected or does your licensing remain as is?

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Vendor Transparency and Communication

- ☐ 1. Does it feel like the vendor is trying to force their cloud solution and subscription over on-premise and perpetual licenses?
- ☐ 2. Are you being sold to directly by the vendor or a reseller/partner?
- ☐ 3. How has the sales process been? Do you feel that the company is customer focused or revenue focused?
- ☐ 4. Has the vendor provided you with references and been open to helping connect you with other end users?
- ☐ 5. Has the vendor provided pricing easily or do you feel that 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. 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?

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?