OMS Key Questions to Ask Providers

Company

1. How long have you been in this business?
2. How many clients have you sold? How many have you lost, and why?
3. What clients fall into your "sweet spot"?
4. What peripheral or support services do you offer (e.g., eCommerce, custom development, logistics)?
5. What do you offer "out of the box"?

Products/Services

If perpetual license:
   a. What are the hosting requirements?
   b. What should I expect regarding upgrades (timing, pain and support)?
   c. Do you provide customization/implementation services?
   d. What are your after launch support services?
   e. Can a third party provide customization/implementation?

If SAAS/ASP:
   a. Do all tiers include maintenance and support?
   b. How often are new features introduced? What do I do if I need a feature you don't have?
   c. What level of online security do you provide?

2. Does your product work with a single database for all the company's back-office functions or will I need to synchronize with several others?
3. How long will a simple installation take? A sophisticated one?
4. Do you offer a free trial? What's it missing?
5. What technical support services are available?
   a. Is your support team located in the US or abroad?
   b. What is your SLA for support issues?
6. Do you have a support knowledge base, community forum, or applications that are shared by customers?
7. How can I export data if I change platforms?
8. Do I own and control my data?
9. How do I import data to get started?
10. Do you provide operational audits?

Features

1. What key features are included in your solution?
   a. What features are currently missing, on your roadmap, does management love? Shoppers?
2. What is your product's competitive advantage over other packages? Why?
   a. Order entry? Customer management? Inventory? A particular vertical?
3. How comprehensive and flexible is your management dashboard?
   a. Can I pull in statistics that come from other, contiguous systems?
4. Is your OMS independent of my selected eCommerce platform?
5. Do you require use of your selected payment processing system or can I choose (or continue to use) the methods I prefer? How much more difficult would it be to use my choice?
6. Does your platform include robust integrated systems, such as logistics, returns management, accounting, marketing, merchandising, analytics, call center and customer management?
   a. Can I integrate your OMS with other, more robust versions of these systems?
   b. How does your platform integrate with other systems - eCommerce, CMS, analytics and back-office (logistics, returns management, call center and customer management)?
      i. If I use third-party systems, does the performance degrade?
      ii. Which applications do you already have standard or custom integrations built?
7. Do you have a management console?
   a. What can I manage with it?
   b. Does it include reporting and a dashboard?
      i. Please describe your reporting capabilities (batch vs. real-time, ad hoc, etc.).
      ii. Please provide a list of standard reports.

Pricing

1. Do you price by the user, concurrent user, server, site, or other?
2. Why do I want to pay to upgrade to the next level?
3. How do you charge for annual support? What about maintenance?
4. Are there any hidden fees (e.g., implementation, transaction costs, revenue sharing?

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