

Technology Reference Checking Questions

Date:

Firm / Organization Contacted:

Person Interviewed:

System Selection / Goals / Requirements

- What are the primary reasons you chose this system / technology?
- What were your requirements / goals for the system / technology?
- Has the system/ technology meet your goals / requirements?

Rollout / Adoption

- How long have you been using the system / technology?
- How are you using the system / technology?
- How many users do you have?
- Who is actively using the system / technology?
- What has the feedback been from users?

Features / Functions

- Has the system / technology functioned as expected?
- What features or functions do you use the most? The least?
- Did you purchase / are you using any additional modules or software and, if so, which ones?

Training

- What type of training was provided?
- How effective were the training and trainers?
- How long did the training take?

- What kinds of materials were provided?

Benefits / Challenges

- What have you found that the system / technology does well?
- What challenges/problems have you had?
- What things have you found lacking in the system / technology? (reports, tools, etc)

Service / Support

- How has the provider's customer service and support been?
- How much support have you needed?

Implementation / Integration / Maintenance

- How long did the installation take and how challenging was it?
- Did the project change course as you implemented and, if so, how?
- Have you done any integration with other firm systems and, if so, what have the benefits and challenges been?
- Has the system / technology had any conflicts with any of your other software or systems?
- How are you handling maintenance and how much time and effort has been required?

Cost

- What was the total cost of the software?
- What was the total cost of services required?
- What was the total cost of training?
- What was the total cost of additional modules?
- What are your ongoing costs?
- Were there any unexpected costs or price increases after the sale?

Additional Questions

- If you had to make the purchase again, would you choose this system / technology?
- What do you most wish you had known before choosing this system / technology?
- How would you describe your relationship with the company / provider?
- What is the best advice you could give us regarding the system / technology?
- Who else do you think it might be helpful for us to speak with?