

Evaluating Vendor Services

How to judge what you can't see

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Introduction

It's a lot of work to pick the right marketing automation system. First you have to figure out what you want to do with it, then translate those goals into functional requirements, and then find vendors who can meet those requirements. By that point you're eager to make a choice and start using your new system. But you're not done yet.

The problem is this: you can't pick a system on features alone. You need to look at services, costs, technology, and vendor background. You can't judge those from a demonstration but they'll have a major impact on your long-term success.

This workbook will help you to assess the service and support capabilities of vendors you are considering.

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Services: What They Are and Why They Matter

Let's start with some definitions. This workbook covers three topics:

- **Deployment** is the help a vendor provides in setting up your system.
- **Support** is the help a vendor provides in operating your system once it's deployed.
- **Account Service** is the help a vendor provides to grow your business.

As the word "help" suggests, vendor services are a supplement your own resources. Your service requirements depend on the scope of your needs and people available to help. Most marketing departments have many needs and not enough people. In other words, they need all the help they can get.

How to Judge Services in Advance

The problem with services is that you don't experience them until after you've purchased the vendor's product. That's a big risk: if the deployment is mismanaged or you can't get problems fixed or don't get good advice on what to do next, your marketing automation system could underperform or fail entirely. To reduce that risk, you need some way to judge the services in advance.

The good news is you can do this. You have to do three things:

- **Talk to the right people.** These include people who'll deliver the services (the vendor's service staff) and people who have already consumed them (reference customers).
- **Ask the right questions.** These uncover how the vendor will handle your problems.
- **Understand the answers.** These answers tell you whether the vendor's approach matches your situation. Finding the right match is the key to success.

That all sounds great –but what if you don't know who to you talk to, what to ask, or how to use their answers? That's why this workbook exists. This guide provides detailed advice on how to judge a potential vendor's services for yourself.

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Deployment

Will the vendor leave you with a well-functioning system? The answer depends on the quality of their deployment staff and process. What's appropriate depends on the resources you have available and the complexity of your environment.

Deployment staff: interview the person who will actually manage your deployment, or someone in the same position. You might also speak with the person in charge of deployment projects.	
What you should ask.	What to listen for.
Who manages the deployment project? Who is involved in executing it? What are their qualifications and background?	Does the vendor staff have adequate technical and management skills? Do they bring in specialists for different parts of the job?
What is your project management methodology? Ask to see a typical deployment project plan with tasks, dates, and labor hours.	Does the vendor have a standard methodology? Is it suitable for a project like ours? Is the schedule realistic?
Does the project include data conversion, CRM synchronization, campaign set-up, lead scoring, user set-up, and training? What else?	What will we be able to do after initial deployment? What additional work will be needed to get full use of your system?
What preparation is needed before the start of the project? How will my staff know what to do?	Is there a detailed task list? Can our staff do what's needed? If not, do we need more time, more help, or a simpler system?
What tasks will my staff perform during the project? What skills are required? How much time will my staff need to commit?	Does our company have the appropriate resources? If not, can the vendor adjust accordingly?
How will you manage data conversion? What are the quality checks and sign-off processes?	Is there a standard conversion procedure? Is it detailed enough to identify problems and ensure quality results?
How will training be delivered and who will do it? What will it cover? Who on my staff will be trained and how much time will it take?	Are the training methods and scope appropriate to our needs? How much of the system will we be able to use from the start?
What is the acceptance process at the end of deployment? What happens if we uncover problems after formal acceptance?	Will we be able to tell whether deployment is accurate and complete? Will we have time to uncover problems?
How do you (the vendor) measure deployment success? Who is held responsible for it? Is there a senior management sponsor?	Does the vendor measure success in the same terms as we do? Is someone at the vendor clearly responsible for success?
How will my system be transferred to the regular support team? Will the deployment staff stay be available after deployment is complete?	Does the same staff do deployment and regular support? Does the vendor have a satisfactory hand-off procedure?
What documentation will we receive at the end of deployment?	Will the documentation be adequate to manage the system and allow further improvements?

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Sales person: your sales person will know about how deployment options and should have some experience with past deployments.	
What deployment services are available and how are they priced?	Does the vendor offer a package that is suited to our needs and budget? If basic deployment is free, what's included?
Is deployment handled by vendor staff or business partners? If both options are available, what's the mix?	If our needs are complex, we may prefer a business partner who is a deployment specialist.
Is there a separate in-house deployment staff or are deployments handled by members of the regular technical support team?	A separate deployment staff is better equipped to handle complex projects.
What kinds of problems have you seen in past deployments? What has the company done to prevent them from happening again?	Does the sales person stay involved? Has the company learned from past mistakes? Are the problems relevant to our situation?
References: interview a client who has recently been involved in a deployment. Their situation should be as similar as possible to yours in terms of project complexity and deployment approach.	
What services were included in the deployment? How complex was it in terms of number of users, data sources, campaign design, etc.?	Was this project similar to ours in scope and complexity?
Who worked on the deployment project for the vendor? How good a job did they do? What were their strengths and weaknesses?	What was the quality of the deployment team? Did the client use the vendor's own staff or a business partner?
Did the deployment team explore your needs before moving ahead? Did the scope change as the project progressed?	Did the vendor take time to understand client needs? Did they adjust well to changes?
How much time did your staff spend on deployment? Was this more or less than originally expected?	How much work will our staff have to do? Are the vendor's estimates realistic?
How long did deployment take? Did it finish on time and on schedule? If there were overruns, how big were they and what caused them?	How long will this take? Are the vendor's estimates realistic? What kinds of problems should we look out for?
What marketing automation features were you able to use after deployment? Have you started to use additional features since then?	Did the deployed system deliver the functionality we want? Has the client continued to expand use of the system?
Did you need to go back after deployment and change how things were originally set up? What kinds of changes and why?	Was the deployment done correctly?
What would you do differently if you could start again? What could the vendor do better?	Are there errors we can avoid?

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Support

Will the vendor solve operational problems cost-effectively? The answer depends on how quickly you can find solutions and what it costs to get them. Although support was traditionally provided by telephone and other direct interactions with company agents, there are now alternatives such as self-service knowledge bases and community forums which can actually do a better job in some situations.

Support chief: interview the head of support services for an overview of support capabilities and policies.	
What you should ask.	What to listen for.
Do you have a formal case handling system? Which channels are included? What are your service standards and escalation rules?	Is the company taking a professional approach to support? Will serious problems be addressed effectively?
How many customer support agents do you employ? How many are full-time vs. part-time? Where are they located?	Is the number of agents reasonable? Are there multiple locations if we need world-wide coverage?
What are the hiring qualifications for your customer support agents? What training do customer support agents receive? What is the average tenure of your agents? What is the annual turnover rate?	Will support agents have the experience and skills to solve our problems efficiently? If the vendor is growing quickly, will it be able to maintain the quality of its support staff?
What tools do support agents have to access client information, remotely view client systems, conference with other experts, etc.?	Has the company invested in technology to make remote support more effective?
Do you have a formal customer support agent rating system? Please describe when it began, how it works, and any trends.	Is the company actively managing support quality? How does it deal with poorly performing agents?
What hours is telephone support available? What happens if I need after-hours support?	Will telephone support hours match our needs, especially if there's a problem outside of normal working hours?
How many support calls come in each day? What are the average wait time and first-call resolution rate? What were they one year ago?	Will telephone support be easily available and effective? Is the company actively managing it?
What hours is email support available? What happens if I need after-hours support? What is your average email response time?	Will email support be an effective alternative to the telephone for less urgent situations?
What hours is online chat support available? How many chat cases are resolved without moving to a different channel?	Does the company use online chat and is it effective?
What hours is social media support available? Which social media do you monitor? What is your average social media response time?	Does the company use social media for support? Has it committed enough resources to be effective?
What self-service support is available (documentation, knowledge base, training videos, etc.)? How many clients use them each day? How do you measure use, success rates, and satisfaction?	Has the company made self-service an effective alternative to telephone support? Does it know how many self-service cases are resolved without later using a different support channel?
Is there a customer forum for support issues? How many posts each day? How many issues are resolved by company staff vs. others?	Is there an active and supportive customer community? Does the company support this with its own staff?

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Support staff: interview a member of the front-line support team.	
How long have you been in this position? What did you do before?	Will support be provided by experienced professionals?
What kind of training did you receive when you started the job? What sort of training have you received since then?	Will support staff be well equipped to solve our problems?
How does the company measure your performance? Do they reward you for anything in particular?	What priorities has the vendor communicated to its support staff?
What kinds of people typically call for help? What is their job, what kind of skills do they have, are they new or experienced users?	Are the system's typical users similar to our own staff? If not, is this system really appropriate for our company?
What are the most common problems people call with? How do you resolve these? How often can you solve a problem on the first call?	How severe are the typical problems? Are they related to user errors or system issues? How quickly are simple problems fixed?
How does the company track the problems and responses?	Does the company monitor problems systematically?
How often do you need help from someone else to solve a problem? What kinds of problems are these? How do you handle them?	Is first-level support staff able to handle most problems by itself? Does the company have good procedures for escalation?
Sales person: your sales person should be able to explain support options and what they've seen happen with past deployments.	
What support services are available and how are they priced? • A dedicated support contact? • Access to senior technical support staff? • Expedited response? • Extended support hours (nights and weekend)? • Support in Europe and Asia? • Multi-lingual staff (which languages are available)?	Does the vendor offer support packages suited to our needs and budget?
Are there any third-party support services available?	Can we get additional help, especially to meet special needs?
References: interview a client who has worked with the vendor for at least one year. Their situation should be similar to yours.	
How long have you been working with the vendor? How many users work on your system? What functions do you use?	Is this person in a situation similar to ours? If not, they may not be a relevant reference.
How often have you needed support? Which channels have you used (telephone, email, self-service, etc.)?	Are they familiar with the company's support services? Have they used all the available methods?
How long does it usually take to solve a problem? Have any problems gone unresolved?	Will problems be resolved quickly and successfully? How well does the vendor handle difficult cases?
How would you rate the service you receive? What are strengths and weaknesses? Anything in particular that should be changed?	What is their over-all satisfaction level with support? Has the vendor left any major support problems unaddressed?

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Service

Will the vendor help me grow my business by making the best use of their system? The answer depends on the scope of services they provide and whether staff is incented to look beyond the vendor's own revenue. Scope is especially important: it includes account service, training, general marketing education, in-house professional services, and external partners. Although the vendor isn't responsible for your success, they can still make it easier.

Account services chief: interview the head of account services for an overview of service capabilities and policies.	
What you should ask.	What to listen for.
What is the job of the account services group?	Is there a formal mission statement? Does it extend beyond the platitude of "customer success" to specifying how they will help?
How many people are in the account service group and how are they organized? How many clients are assigned to a typical account rep?	Will the organization offer the level of support we need? Will we benefit from shared experience without violating confidentiality?
What are the hiring qualifications for your account reps? What training do they receive? What are the average tenure and turnover rate?	Will we be dealing with experienced professionals? What level of sophistication can we expect?
How do you compensate your service reps? How much compensation is incentive-based? What behavior or results are incentivized?	Are incentives aligned with the client's long-run interest or only with vendor revenue? Are they large enough to impact behavior?
How do you evaluate your service reps? When was the last time an underperforming rep was removed from their job?	Is there a formal evaluation system? What does it measure? How much do clients' opinions count? How do they handle problems?
Do you have "success managers" in addition to "account managers"? If so, what are success managers' background, training, and duties?	Will we get advice from someone who is not focused primarily on generating revenue for the vendor? How skilled with they be?
Account service rep: interview the person who would service your account, or someone currently servicing other, similar accounts	
How long have you been in this position? What did you do before?	Will account service be provided by experienced professionals?
What kind of training did you receive when you started the job? What sort of training have you received since then?	Will account service staff be well equipped to support our business?
What is the purpose of your job? What specific services do you provide your clients? How do you spend most of your time?	Do account service reps clearly understand their mission?
How many clients do you support? How often do you speak with them? What kinds of companies are they?	Will we get adequate attention?
How does the company measure your performance? Is your compensation tied to any specific measures? What are they?	What priorities has the vendor communicated to its account service staff?
What changes would help you to do your job better or to make your clients more successful? Why haven't these been implemented?	Do they constantly consider ways to improve results? Is the company responsive to suggestions?

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Training chief: interview the head of training for an overview of training capabilities and policies.	
How many people do training and how are they organized?	How much has the vendor invested in training staff and services?
What are the hiring qualifications for your trainers? What training do they receive? What are the average tenure and turnover rate?	Will we be dealing with experienced professionals? What level of sophistication can we expect?
What training options are available and how are they priced? • Off-site classes (at what locations?) • On-site classes at clients • Online classes (live courses) • Self-service classes and videos • Custom classes tailored to a client's needs and system	Does the vendor offer training packages suited to our needs and budget?
How many formal training classes are available? Provide a catalog with topics and qualifications.	What is the breadth of training available? Will it cover my technical staff as well as marketing operations needs?
How much training time is required to master basic system features? Does the company track actual usage of features after training?	How much time will we need to invest in learning the system? Does the vendor study training results so it can improve them?
What features are typically used within the first six months? Within the first year? After two years?	Does the vendor track system usage so it can identify problems areas and find clients who need additional help?
Do you track usage of system features by each client? Do you identify and reach out to clients who may need additional training?	Does the company monitor and encourage full use of the system?
Does the company provide general marketing education beyond training in system features? What is available?	Will the vendor help us to become better marketers? Will they help us to learn about new marketing methods?
Professional services chief: interview the head of professional services for an overview of the services available.	
How many people are in the professional services group, how are they organized, and how do you recruit them?	How much help can I expect from the vendor's professional services group? Are they qualified professionals?
What professional services are available and how are they priced? • CRM integration and synchronization • External data acquisition and integration • Custom development and API support • System hosting (for non-SaaS products) • Email deliverability consulting • Lead scoring design and set-up • Process consulting (in marketing and sales/marketing alignment) • Marketing operations (run the system for me) • Agency services (design campaigns, create content, etc.)	Does the vendor offer services suited to our needs and budget?

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Partner relations chief: ask to interview the person in charge of setting up relations with business partners such as agencies, developers, and system integrators	
How many partners do you have? Please provide a list.	Have a large number of companies decided the vendor is worth a partnership? Are they companies we want to work with?
What kinds of services are available through partners? • System deployment and integration • Agency services • Complementary technology • External data	Will partners be available to provide services we need?
How do you decide which partners to work with? Is there a formal partner program?	Has the vendor made a serious commitment to working with partners? This is a sign of maturity and professionalism.
What technical and sales support do you provide to partners? What are the financial arrangements?	What kinds of resources has the vendor invested in partner relationships?
Are there areas where your partners and in-house professional services overlap? How do you handle any conflicts?	Does the vendor have a clear strategy for managing its partner relationships?
Sales person: ask your sales person about service capabilities.	
What account services are available and how are they priced? • Account service manager? • Customer success manager? • Training and education • Professional services • Partners	Does the vendor offer services suited to our needs and budget?
Are there local or national user groups? Where? When do they meet? How many customers participate? How do you support them?	Will we be able to learn from other clients of the vendor? How active is this group?
Are there local or national user conferences? How often? How many customers participate? Describe the most recent agenda.	Will we be able to learn from other clients of the vendor? How active is this group?
References: ask to interview a client who has worked with the vendor for at least one year and used multiple services.	
How long have you been working with the vendor? How many users work on your system? What functions do you use?	Is this person in a situation similar to ours? If not, they may not be a relevant reference.
What vendor services have you used? How would you rate the results? What were strengths and weaknesses?	Will we be able to get the services we need?
Were there other services you wanted but couldn't get? How did this impact your long-term results?	Will we be able to get the services we need?

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About Raab Associates Inc.

[Raab Associates](#) is an independent consulting firm that helps marketers get the most from today's technology. We help our clients to define needs, evaluate vendors, make selections, plan deployment, and measure results. Established in 1987, Raab Associates is noted for thorough research and objective advice. For more information, visit www.raabassociatesinc.com or email info@raabassociates.com.