



Reference/Site Visit Questionnaire for Vendor Customers

This deliverable documents questions to ask a vendor's customer references so that additional information may be obtained about the vendor and the packaged software. Use this deliverable when contacting the vendor's customer references or conducting site visits.

I. IPT Name:		
II. Deliverable Name: Reference/Site Visit Questionnaire for Vendor Customers	Date Completed:	
III. Contact Information		
	Name	Channel Unit
IPT Sponsor		
Channel Task Manager		
CIO Task Manager		
Contractor Task Manager		
IV. Task Order Number:		

Reference Background

Describe your company in terms of size and type of business.

- Annual sales:
- Number of sites:
- Number of employees:
- Number of customers:
- Major business/products:

What packaged software modules did you purchase?

What kind of applications did you replace (custom/packaged)?

How long have they been installed?

How long have you been a customer?

How many sites are using the packaged software?

How many users do you have on the application?

How many transactions do you run on a monthly, weekly, etc. basis and what is the performance like?



Installation

Were any modifications made to the packaged software?

- During the installation:
- After the installation:

What was the vendor's attitude towards making modifications?

What was your time frame for installation?

Was the installation completed on schedule?

Did any unexpected costs arise during the installation?

What would you do differently during the installation?

Functionality

Project specific - Critical Factors

- Multinational:
- Regulatory Reporting:
- Drill-down reporting:
- Integration issues:
- Product weaknesses:

Vendor Comments

Are you satisfied with the training and level of support from the vendor?

- Training:
- Installation support:
- Telephone support:

How would you characterize your relationship with the vendor?