

Customer Reference Checklist

What does better mean to you, your company and your employees? In an employee recognition or incentive program, you should believe that better begins before you make a single purchase and agree to make the switch. Ask to connect with the provider's current customers and ownership. Receiving input from someone other than a sales representative can more accurately inform your understanding of how the things works, and how companies like yours will benefit.

Work with your provider to connect with two or three current customers who would be willing to speak with you directly. When making this request, ensure that the customer:

- is of a similar employee size;
- uses the same specific product you are interested in;
- has been a customer for more than one year; and if possible
- speak to a contact that is no longer a current customer.

If a provider is unwilling to connect you with current customers at this stage of the buying process, it may be a "Buyers Beware" sign.

Once you've scheduled phone conversations with current customers, it's important to ask questions that will yield the most informative insight about all aspects of your decision. Consider the following.

Customer Reference Questions

Question #1: Has the product met your expectations? Are you satisfied with this product/service?

Question #2: Has this system met your employee recognition and incentive requirements? Did you achieve better technology, rewards and communication?

Question #3: Are you confident in this provider's product roadmap? Do you have confidence it will continue to innovate, develop and provide regular updates to its software?

Question #4: What "sold" you? Features? Anticipated ROI? Customer service? Ease of use?

Question #5: Describe the configurability (unique workflows, specific fields, etc.) of the system. Is it easy to make changes or will they do them for you at no additional cost?

Question #6: Did you switch to this provider from another? If so, why did you think their approach would be the best choice for your business?

Question #7: Were you trained on how to use the system? Did the training meet your needs?

Question #8: Did you experience any issues during implementation? After implementation?

Question #9: Have you made request for changes to the system? If so, were the changes or enhancements you recommended implemented quickly?

Question #10: Did your employees see more value in their rewards by making the switch?