State of Vermont

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Project Name Here

Vender Reference Check

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Prepared By: (Your Name)

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# Revision History

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| Version | Date | Author(s) | Revision Notes |
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#

# Introduction

Vendor: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*When checking references, please use the following introduction. Please use the questions below verbatim so that responses may be compared accurately. A convenient interview time (one hour) will have been preset. A copy of the questionnaire will have been sent in advance.*

Hello, my name is \_\_\_\_\_\_\_\_\_\_\_\_ and I represent the \_\_\_\_\_\_\_\_\_\_\_\_\_Department. We are evaluating bid responses to an RFP for a new \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ system. Your name has been provided as a reference by \_\_\_ (company) and I would like to ask some questions. Let me begin by introducing those participating in this reference check.

Participants: Name and role

 Name and role

 Name and role

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** (client reference*)*

According to \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ *(vendor)* I should be talking to \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ *(name)*, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ *(title)* and you are responsible for \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. Could you introduce those that are participating in this reference check and their roles?

Reference Participants \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. How many active and retired members are in your system? Number: \_\_\_\_\_
2. How many plans, systems do you administer? Number: \_\_\_\_\_
3. How many people do you have on your Retirement staff? Number: \_\_\_\_\_
4. How many people do you have on your IT staff? Number: \_\_\_\_\_

# Company

1. Based on your experience with the company, how would you rate them in regard to meeting their development schedules with your systems?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Significantly positive  | Moderately positive | Neutral | Moderately negative | Significantly negative |

1. How many people were involved in the delivery and installation of the product? Was that number sufficient for the effort? Number: \_\_\_\_\_

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Yes |  |  |  | No |

1. Was a prime contact / project manager named? Who? \_\_\_\_\_\_\_\_\_\_\_\_\_

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Yes |  |  |  | No |

1. Was the prime contact the same person for the duration of the project?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Yes |  |  |  | No |

1. Was the project manager easy to work with, organized, and keep the project on schedule?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Yes |  |  |  | No |

1. Did the project manager receive good support from the home office, such as the ability to bring in specialists when necessary?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Yes |  |  |  | No |

1. Were there any significant problems with project management?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Yes |  |  |  | No |

1. If yes, what were the problems?

|  |
| --- |
| ? |

1. Was the system installed on time?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Yes |  |  |  | No |

1. Were there any significant problems?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Yes |  |  |  | No |

1. If yes, what were the problems?

|  |
| --- |
| ? |

1. Did the vendor provide sufficiently knowledgeable personnel for installation?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Yes |  |  |  | No |

1. Has the company been responsive to **software** problems since the installation?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Yes |  |  |  | No |

1. Has the company been responsive to **hardware** problems since the installation?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Yes |  |  |  | No |

1. How would you characterize the quality of the software support the company has given since the installation?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Significantly positive  | Moderately positive  | Neutral | Moderately negative  | Significantly negative  |

1. Would you do business with this vendor again if given the opportunity?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Yes |  |  |  | No |

1. Are you a member of any user groups?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Yes |  |  |  | No |

1. If so, how would you characterize the vendor’s responsiveness to requests from the user group?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Significantly responsive | Moderately responsive  | Neutral | Moderately unresponsive  | Significantly unresponsive  |

1. Are there any aspects of your dealings with this vendor that we should be aware of in order to improve our chances of getting an economical, quality, and responsive product?

|  |
| --- |
| ? |

1. Do you know anyone else using this product that could give us some additional information or insight into the company or the product?

|  |
| --- |
| ? |

# Solution

1. Based on your experience, how would you rate your satisfaction with the solution?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Significantly positive | Moderately positive | Neutral | Moderately negative | Significantly negative |

1. When was the solution installed?

|  |
| --- |
| ? |

1. Is the functionality now available in the solution as promised in the contract?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Significantly positive | Moderately positive | Neutral | Moderately negative | Significantly negative |

1. Is the performance and response time of the solution as promised in the contract?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Significantly positive | Moderately positive | Neutral | Moderately negative | Significantly negative |

1. Was the solution delivered easy to learn and use?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Significantly positive | Moderately positive | Neutral | Moderately negative | Significantly negative |

1. What are the major strengths of this system?

|  |
| --- |
| ? |

1. What do you consider to be the major problem or problems with this system?

|  |
| --- |
| ? |

1. In your opinion, does the solution perform efficiently?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Yes |  |  |  | No |

1. How many modifications to the basic system were required at installation?

|  |
| --- |
| ? |

1. Did the vendor use a software “template” that was modified to meet your organization’s specific requirements?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Yes |  |  |  | No |

1. Was the functionality delivered satisfactory relative to the requirements stated in the RFP?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Yes |  |  |  | No |

1. Were custom programs written?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Yes |  |  |  | No |

1. How many custom programs had to be written and what was their function?

|  |
| --- |
| ? |

1. Was sufficient documentation provided for your users, system analysts, and technical people?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Yes |  |  |  | No |

1. Is the documentation clear, concise, and easy to use?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Yes |  |  |  | No |

1. Did the vendor provide sufficient user and technical training, including that for employers if such was requested?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Yes |  |  |  | No |

1. After the training, as you began to use the system, did you feel the training was sufficient in depth and of the appropriate kind?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Yes |  |  |  | No |

1. Were you satisfied with the amount of testing done during user acceptance testing?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Very satisfied | Moderately satisfied  | Neutral | Moderately unsatisfied  | Significantly unsatisfied  |

1. What is the current release level of your software solution?

|  |
| --- |
| ? |

1. Have there been any updates?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Yes |  |  |  | No |

1. Have updates and revisions been timely and easy to install?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Yes |  |  |  | No |

1. Is the response time to process or post a typical transaction in the range you had required?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Yes |  |  |  | No |

1. Has your staff made modifications to the solution?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Yes |  |  |  | No |

1. How would you rate the ease of modifying the system?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Significantly positive | Moderately positive | Neutral | Moderately negative | Significantly negative |

1. What is your staff’s technical level?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Very strong | Moderately strong | Neutral | Moderately challenged | Significantly challenged |

1. What is your staff’s experience level?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Very strong | Moderately strong | Neutral | Moderately challenged | Significantly challenged |

1. How responsive was the vendor to resolving problems during the warranty period?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Often or always prompt  | Sometimes prompt | Neutral | Sometimes delinquent | Often or always delinquent |

1. Did the vendor request what you might consider an excessive number of change orders during the project?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Yes |  |  |   | No |

1. How effective was the solution provider in controlling “scope creep” and in containing the cost of the implemented solution?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Very effectively | Moderately effective | Neutral | Moderately challenged | Significantly challenged |

1. How accurately did the solution provider estimate the time required from your staff including system requirements review, user acceptance testing, training, and rollout?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Very accurate | Moderately accurate | Neutral | Moderately inaccurate | Significantly inaccurate |

# Technical Environment

**These questions are about your hardware operating environment.**

1. What kind of workstations are you using?

|  |
| --- |
| ? |

1. What is the capacity in megabytes of the hard drive in the workstation?

|  |
| --- |
| ? |

1. Do your workstations operate in a LAN environment?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Yes |  |  |  | No |

1. Does your system use optical imaging? If yes, please describe.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Yes |  |  |  | No |

|  |
| --- |
| ? |

**These questions are about the software environment for your workstations.**

1. What is the operating system for the workstation?

|  |
| --- |
| ? |

1. What is your network operating system?

|  |
| --- |
| ? |

1. Are you satisfied with your network operating system?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Yes |  |  |  | No |

**These questions are about the main processing platform(s).**

1. Is the solution thin client and browser-based?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Yes |  |  |  | No |

1. If a browser-based solution was selected, what are some of the benefits you have realized in maintenance, support and deployment that can be attributed to its being a browser-based solution?

|  |
| --- |
| ? |

1. Have you encountered any problems with incompatibility among browsers used to access the solution?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Yes |  |  |  | No |

1. If “yes” to above, what were some of the problems you encountered?

|  |
| --- |
| ? |

1. Are you connected to a main processing platform / server?

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Yes |  |  |  | No |

1. To what platform(s) / server(s) are you connected?

|  |
| --- |
| ? |

1. What operating system software are you using?

|  |
| --- |
| ? |

1. What database management software are you using?

|  |
| --- |
| ? |

1. What report writer product are you using?

|  |
| --- |
| ? |

1. What 4GL product are you using?

|  |
| --- |
| ? |