



10 Do's and Don'ts for Vendor Reference Calls

When engaging with a new vendor for your HRIS system, calling references is arguably one of the most important steps of the process. Although it can be time consuming to coordinate calls and analyze the feedback, the comments of peers who have recently gone through the same process can be invaluable. Below the Do's and Don'ts:



1. Time

The reference provider at the other end of the line is not gaining much by giving a vendor reference; this call is a “favor” to the vendor, and you are the beneficiary. Reference calls are normally scheduled as a confirmation of the picture you have of the vendor. The calls are important because they can change your mind about hiring the vendor.

Keep the call no longer than 30 minutes; be sure you have blocked off extra time in the event the call starts late. Keep an eye on the clock and make sure you get your most important questions in.

2. Preparation

Have your question list ready; ideally you'll send it out beforehand so the reference provider can prepare and gather answers as well. You may think this will cause them to give a less-than-honest on-the-spot answer, but remember, they are not gaining anything from the call and will work to keep their integrity.

Most likely you will get better qualified and balanced answers and the reference may let you know in advance that they cannot speak on certain topics. That can give the vendor time to arrange another reference.

3. Focus

Focus on the most important area. Is it the functionality of the software? Ease of use? Configurability? Or do you have questions about implementation and support? You want to speak to the right people. If you are interested in the ease of use and you're speaking with the CHRO, he or she may not use the system daily, and therefore are not the right person to ask. It will be the right person to speak with regarding reporting and analytics. Ideally, you will speak with someone who does both of the above. Avoid talking to references who are “still under development.”

4. Ask qualifying questions

Ask a few qualifying questions up front:
“How did you come across vendor?”
“What type of selection process did you employ?” “How is your team organized?” “When did you first launch the vendor's solution?” “When was the last major upgrade?”

5. Keep it positive

Every reference wants to say a few nice words. After the qualifying questions, keep it on a positive note. Ask about the vendor's strengths first. This approach is disarming, and reassures the reference that you will be fair-minded if they choose to open up.

6. Ask the difficult questions

Even if the vendor made significant mistakes, a reference will be reluctant to say so. Don't expect a reference to disclose private matters. But it is fair and proper to ask where the vendor can improve.

7. Try using a scale

Wherever possible, ask the reference to grade on a scale. For example, "On a scale of 1 to 5, how satisfied are you with ...?" "How confident are you that ...?" "How well did they do with ...?" Use measures that anchor each response. If they give the highest grade, don't ask why. Just move along. Pay attention to what stands out. If the scores are 5, 5, 5, 5, 3 you can pause to drill deeper.

9. Look forward

The reference should not just look at the past, but also to the future. What is their level of confidence in using the vendor in the future? I always ask if they feel the vendor will meet their needs in the next 3 to 5 years. It is a major red flag if they hedge on this question.

10. Finish strong

In the end, don't forget to ask these four questions.

- If you need additional services in the future similar to what the vendor provides, what is the likelihood that you would choose the vendor again?
- What advice do you have for me in working with the vendor?
- Can I come back to you if I have follow-up questions?
- Are there any important questions that I should have asked but didn't?

These guidelines will help you to be better prepared and to make the right choice. Additionally, you will have a new contact in your network from which you can benefit in the future.

Opening questions

1. How did you come across vendor?
2. What type of selection process did you employ—RFP, single source?
3. Did you consider other vendors?
4. Why did you decide to go with vendor?
5. Is the vendor still providing services or has the engagement been completed?

General questions

1. What are the strengths of the vendor?
2. How well did the vendor understand your business needs?
3. Did the vendor fully meet your expectations on the engagement?
4. Did the vendor fully understand your business needs in the design of the engagement?
5. Did the vendor maintain clear communications and engagement during all phases of the engagement? What could the vendor have done to better communicate?
6. On a scale of 1 – 5, with 5 being the highest, how satisfied are you with the skills of the people from the vendor who worked on this engagement? Ask why if they didn't get a 5.
7. Was the engagement managed effectively? What could the vendor have done better?
8. Did you have to make any changes to the contract after vendor began performing, such as change controls?
9. Where the different millstones reached on time?
10. On a scale of 1 – 5, with 5 being the highest, how satisfied are you with how the vendor delivered on the project? Ask why if less than 5.
11. Was there a point on the project where the vendor let you down, underperformed, or disappointed you? If so, how was this resolved?
12. What one thing could the vendor have done to improve your overall experience with them?
13. If there was one thing you could have changed about the vendor in the performance of the engagement, what would it be?

Closing questions

1. If you needed additional services in the future similar to what the vendor provides, what is the likelihood that you would choose the vendor again?
 2. What advice do you have for me in working with the vendor?
 3. Are there any important questions that I should have asked but didn't?
 4. Can I come back to you if I have follow-up questions?
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