

Reference organization:

POC:

Staff Size:

Membership Type (Organizational / Individual):

Date:

## **AMS Reference Questions**

- 1. Overview of reference's organization (size, organization type, modules used, etc.)
- 2. When was the product selected? What other solutions were considered?
  - O What were 1 or 2 key decision points for the selected vendor?
- 3. Did the Vendor and your Core Team identify and agree on outcomes for the project?
- 4. Did the Vendor adhere to the implementation timeline and budget?
  - o If your project was over time/budget, what would you recommend as a contingency?
- 5. Did the Vendor do a good job managing the project?
- 6. Did YOUR organization follow the implementation plan?
  - O What worked, what needed to be adjusted?
- 7. Have other products been integrated with the AMS? How are the integrations working?
- 8. What level of advanced configuration and customization has been done?
- 9. Have other products been integrated with the AMS?
  - O What systems are integrated?
  - o Can staff members manage the integration (e.g. select data that is exchanged between systems?)
  - O How are the integrations working?
- 10. When was the product selected? What other solutions were considered?
- 11. Did Vendor stick to the outcomes of the discovery?
- 12. Did the Vendor adhere to the implementation timeline and budget?
- 13. Did the Vendor do a good job managing the project?
- 14. Data Conversion: What was the migration experience? How much was your responsibility for the migration? Have you used all of the converted data?
- 15. What type of training was provided (in-person, remote, on demand)? Did it meet your needs?
- 16. How did the launch go? How long/number of staff were dedicated to the launch?
- 17. Has the post launch support (including technical) been satisfactory?
- 18. What advice would you share for my organization to improve the discovery and/or implementation experience?
- 19. What was the biggest learning curve for the team?
- 20. What was the biggest learning curve for the vendor?
- 21. What tasks/work would you defer until post-launch to better understand the system?

## What to listen for:

- o Did the reference and vendor have enough time to prepare for the implementation?
- What were surprises that you can avoid with better planning?
- What are processes the reference organization and vendor follow that you should consider?
- O What caused any cost/timeline delays?
  - 1. Project delays
  - 2. Scope changes
  - 3. Incorrect estimates
- What was the process to work together with the vendor