

Reference Check Template

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?
 - What were one or two 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?
 - 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?
 - 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?
 - What systems are integrated?
 - Can staff members manage the integration (e.g. select data that is exchanged between systems?)
 - How are the integrations working?
10. When was the product selected? What other solutions were considered?
11. Did the Vendor adhere to the implementation timeline and budget?
12. Did the Vendor do a good job managing the project?
13. Data Conversion: What was the migration experience? How much was your responsibility for the migration? Have you used all of the converted data?
14. What type of training was provided (in-person, remote, on demand)? Did it meet your needs?
15. How did the launch go? How long/number of staff were dedicated to the launch?
16. Has the post launch support (including technical) been satisfactory?
17. What advice would you share for my organization to improve the discovery and/or implementation experience?
18. What was the biggest learning curve for the team?
19. What was the biggest learning curve for the vendor?
20. What tasks/work would you defer until post-launch to better understand the system?



What to Listen For

- 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?
- What caused any cost/timeline delays?
 - Project delays
 - Scope changes
 - Incorrect estimates
- What was the process to work together with the vendor?

