

CRITICAL QUESTIONS TO ASK DURING YOUR DEMO



Introduction

Select the questions that are relevant to your situation. During your demo, note the answers below.

1. How do I get my information into the system?

Specify the format in which your information currently exists:

PDF, Word, paper, in a database, captured from mobile phones, etc.

2. How easy is it to expand your solution?

3. How will your solution address my pain point? Specify what prompted you to look into document management in the first place, so that the provider can handle your situation.

4. How can I update your solution to take advantage of new functionality?

5. How does your system help my organization increase regulatory compliance? Specify which regulations apply to your organization.

6. What sort of support do you offer? How much does it cost?

6. How can your solution help us provide access to other departments or other offices? What about clients or business partners?

8. What training options are available? At what cost?

-
- ○ ○
- ○
-

