

Evaluating SaaS Vendors

Make no mistake: all cloud-based services are not created equal. While there are “best practices” and certifications within the industry, it will require some due diligence to fully assess a potential vendor.

Listed below are common questions used to evaluate cloud-based service providers to determine if they will work for you. While no list is complete, it can serve as an evaluative baseline through which to consider a potential vendor.

<u>Who are the proven, reputable companies in the industry?</u>	<u>Vendor A</u>	<u>Vendor B</u>	<u>Vendor C</u>
<u>Functionality</u>			
Does the application offer secure mobile firm management via a smartphone, laptop or tablet device?			
Does it integrate with Outlook® calendar, contacts, and email?			
Does it integrate with Google® calendar & contacts?			
Does it integrate with Mac® calendar & contacts?			
Does it offer a secure client portal?			
Does it offer centralized calendar and task management?			

Does it offer centralized client and contact management?			
Does it offer centralized matter management?			
Does it include storage of files and documents, online, with no preset limit?			
Is there a global conflict of interest search?			
Are there various levels of permissions based on roles?			
Are there configurable areas of practice templates/forms?			
Does it have real-time calendar management and sharing?			
Is there 24/7 customer service? Can you get someone on the phone?			
Does it offer online product videos AND live product demonstrations?			
<u>Data Protection</u>			
What type of encryption is used to protect my data?			

What are their third party certifications and/or other industry certifications?			
How secure is their physical environment?			
How—and how often—do they test their systems?			
Do they monitor for intrusions in real time?			
Are their data centers U.S. based?			
<u>Data Ownership</u>			
What are their contract terms and conditions?			
What systems are in place to restore my data in case of disaster?			
What happens if I terminate my service?			
Who “owns” the data?			
Who has access to my data, besides me and my authorized staff?			

Does the vendor outsource any of their services to third parties providers, and if so, what are their credentials?			
Does their Terms of Service or Service Level Agreement address confidentiality?			
In what ways, if any, do they make use of my data (i.e. anonymously to track usage, etc.)?			
<u>Data Availability</u>			
What are their uptime guarantees?			
What financial penalties do they impose for late payments?			
Do they have backups of their own data?			
Do they offer a trial period?			
How many data centers do they have in total?			
If the vendor goes out of business, will I have access to the data and the software or source code?			

Do they have a data recovery plan of their own in place?			
Do they have a business continuity plan of their own in place?			
<u>Other Considerations</u>			
What is the total cost per year/per user?			
What is my overall budget?			
Can I try before I buy?			
Does their system integrate with email?			