



# SaaS Procurement CHECKLIST



## MOBILE ACCESS

Your team and your clients need the flexibility of mobile access to stay competitive. Look for a cloud-based software with mobile and web browser access to features, dashboards and data.



## INTEGRATION

Software platforms need to easily integrate with your connected systems, like your BMS, CRM or billing software. Check the vendor's list of supported brands and models.



## CUSTOMER SUPPORT

Take advantage of free demos and trial periods to kick the tires on a vendor's customer service. Submit a work order and note response times.



## PRICING MODEL

Read their pricing page carefully. Even if the annual plan is cheaper, it may contain stipulations like extra costs for adding accounts or transactions.



## TRAINING RESOURCES

Any SaaS vendor worth their salt will offer a healthy library of video tutorials, how-to guides, in-office training and online resources.



## REVIEWS

Use review sites like Capterra and G2. Sites like these let you make an apples-to-apples comparison of SaaS platforms.



## DATA SECURITY

Data storage, collection and encryption are a security and compliance issue, so ask about these practices. Look for security standards and certifications for cloud-based software.



## USABILITY

Ill-designed SaaS platforms erode their effectiveness, so evaluate the user interface, navigation and responsiveness of the platform.



## DATA OWNERSHIP

Who owns your data is also a key consideration, especially when and if you ever switch to another vendor. Ask about the data transfer process to other platforms.



## GROWTH

Will the platform grow with your business? Is there a limit on the number of users? Does the company have plans for expanding features?