

Smart Buyer Checklist

Questions to Ask Before you Buy

Security and Compliance

- How is data secured?
- Does it integrate with [Microsoft 365](#) authentication (for example, Entra ID)?
- Where is data stored?
- Are you compliant with industry standards?

Integration and Compatibility

- Will it integrate with our current tools?
- How easy is setup and management?
- Can it connect or automate workflows?

Scalability and Support

- Will it scale as we grow?
- What support is included?
- How are updates handled?

Cost and Commitment

- What's the total cost of ownership?
- Are there hidden costs?
- What are the renewal terms?

Usability and Adoption

- How easy is it to use?
- Is training provided?

- What does a typical adoption journey look like?

Roles and Responsibilities

- What are we, the customer, responsible for?
- What's outside *your* (the vendor's) scope?

Pro tip: Many surprises happen here. Businesses often purchase a solution without realizing that the implementation, daily support, or data protection falls back on them. We help clients define and plan for this before making a purchase, so nothing slips through the cracks.

Have Questions? Connect with us today

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