

The Partner Selection Process



Now that you've decided you're ready to begin the journey and have found a few potential providers, let's talk through some of the **important considerations to look out for as you start engaging with these companies.**



Gauging the Process Itself

Is the platform provider taking the time to understand your unique business needs? Providers want to put their best foot forward during this process. If you're not impressed now, it may be safe to assume you'll only continue to feel less comfortable once the official engagement begins.



Looking "Under the Hood"

As you work through the selection process, try to look past the surface-level functions to better understand the technology behind what it does. Understand the current functionality versus the enhancements they have planned. Invest in a solution that fits your needs today *and* that can scale as you grow or expand.



Customizing Your Discovery Calls

Are they tailoring the demo to address the needs you previously discussed? Don't settle for a generic demo process that may not be relevant. Ask them about your specific pain points and how their solution solves those. Come prepared with questions and be clear about your expectations, especially if you have an implementation deadline.



Paying Attention to Communication

Providers should be reaching out to you proactively throughout the selection process, checking in to ensure you receive relevant information that's tailored to your concerns and goals. If you have a hard time communicating with a platform during the selection process, keep in mind you can likely expect similar levels of service moving forward as a client.



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