

ENTERPRISE

# Salon & Spa Software Evaluation Checklist





Committing to new software can feel overwhelming. There are many moving parts and various factors to consider. What questions should you ask the enterprise software vendors you're considering? We've built this checklist to help make the evaluation process easier. First, determine the top reasons why you're considering a software change. Then, you can explore other variables like scalability, customer support, marketing, and reporting.

What top features do you need from your salon/spa software?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Some examples:

- Has experience and scale to meet my growth plans
- More marketing exposure to consumers in my market(s)
- Better mobile experience for my clients
- More robust reporting to measure my business results
- More secure environment
- Better customer support and education

Next, work through each of these categories and ask your future software provider the following questions.

YOUR NOTES

# Scalability

**Ability to support an organization of your size and grow with you over time**

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How does your company support enterprise businesses of our size?

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How many locations does your largest customer have?

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How many locations do each of your top 20 customers have?

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How many franchise organizations with over 40 locations do you support?

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# Customer Service Support

**The availability and range of guidance offered**

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What are the hours of your customer service team? Is 24/7 email and phone support available?

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How do your clients reach your customer support teams? (e.g., email forms, phone, email, etc.)

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Do you have a direct phone number for enterprise customers?

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What is the turnaround time on getting a response from support?

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Will I have a dedicated support team?

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How much support time do I get with my dedicated team? Are there monthly limits? Or does support end after a certain number of months?

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Is my dedicated support team available outside of business hours? Does the coverage include multiple time zones?

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How do I communicate with my dedicated support team? Do you provide personal company contact info?

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What kind of custom-ongoing software and business education for our franchisees/locations do you offer? (For example, technical manuals, video tutorials, online chat, and user support communities, etc.?)

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What percentage of your employees fulfill a primarily support-based role?

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## Product Innovations and Enhancements

Consciously evolving software that stays ahead of tech innovation and customer needs

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How do you communicate upcoming product features?

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How do you intake product and feature requests?

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What does your product roadmap process look like for enterprise customers?

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Do your enterprise customers get direct access/communication with product teams?

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What opportunities do enterprise customers have to influence the product roadmap?

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## Security and Reliability

Keeping your data safe and confidential

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What security certifications do you have?

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How much do you invest in security each year?

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When was your most recent data breach?

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What are you doing to protect against the spike in ransomware attacks?

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How many people are on your security team?

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Do you conduct regular feature and load testing?

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## Marketing/Branding

Helping you increase visibility, engagement, and authority with your audience

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What tools do you have to help reach a broader audience/new clients?

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What tools do you have in place to ensure brand integrity?

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How do you help your customers create brand consistency between locations?

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How does your solution help us to retain new customers?

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## Reporting

Helping you track, measure, and quantify success

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What kind of reporting does your software include?

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Can different users have their own reporting configured?

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Can you provide a list of the standard reports that are included within our software?

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Are direct database queries required for custom reporting, or does the software offer integrated functionality to create custom reports?

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Does the software include graphical reporting features?

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## Customization

Personalization opportunities for your brand

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What kind of interface protocol does your API utilize?

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What are some of the programs your software has successfully integrated with?

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Can the software be configured to allow different user roles access to different functionality, and how granular are these controls?

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What are your service-level agreements, and do they cover terms of data-loss or theft?

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## Pilot Programs

### Test-driving software before making a final decision

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Can we pilot new software from a live location using real-time data?

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Do our stakeholder's success criteria align with the proposed pilot plan?

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Will this new solution help achieve our goals, or do we need other solutions to reach them?

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What are the KPIs we should measure to ensure success during the pilot?

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Will we have a POC during the pilot program? If so, how much time will they dedicate to supporting us through the pilot and will they be available to answer our questions?

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## Onboarding

### Officially migrating to a new software platform

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Will we have a dedicated onboarding team?

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What is the estimated time to launch new sites and changes and updates?

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How many hours do we need to budget internally for software implementation and training?

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Interest in learning how Mindbody can grow your brand?

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