

OCBMS EVALUATION CHECKLIST

THE EVALUATION PROCESS: 3 QUESTIONS YOU MUST ANSWER BEFORE YOU BEGIN

1. Why do you want to implement or improve your OCBMS?

2. What are your real business requirements?

3. What is your budget and real projected ROI?

EVALUATION CRITERIA:

1. CORE BUSINESS FUNCTIONS

- ☐ Customer Relationship Management (CRM) _____
- ☐ Accounting _____
- ☐ Forecasting & Purchasing _____
- ☐ Products (PIM) _____
- ☐ Inventory/Warehouse Management _____

2. INTEGRATION CAPABILITIES

- ☐ eCommerce packages _____
- ☐ Selling channels _____
- ☐ Shipping providers _____
- ☐ Payment processors _____
- ☐ E-mail providers _____
- ☐ Marketing services _____
- ☐ Fraud prevention _____
- ☐ Other _____

EVALUATION CRITERIA (cont):

3. ADAPTABILITY & CUSTOMIZATION

☐ Readily

☐ Limited

☐ None

Notes _____

4. TECHNOLOGY

☐ Database _____

☐ Server(s) _____

☐ Speed _____

☐ Scalability _____

☐ APIs with other systems _____

☐ IT/support considerations _____

Notes _____

5. INSTALLATION TYPE

☐ Cloud/SaaS

☐ On Premise

☐ Hybrid

Notes _____

EVALUATION CRITERIA (CONT):

6. THE COMPANY

a) History _____

b) Service & Support _____

c) Training _____

d) Existing Clients _____

e) Notes _____

7. TOTAL COST OF OWNERSHIP

☐ Licenses (one-time) + _____

☐ Subscription (monthly/annually) + _____

☐ Initial integration + _____

☐ Custom development + _____

☐ Ongoing maintenance + _____

☐ Server, hosting, infrastructure + _____

☐ Personnel - additional costs + _____

☐ Personnel - anticipated savings - _____

Notes _____
