POS RFP CONSIDERATIONS

by Tim Vainer, National Accounts Manager

Selecting a POS company that can uphold your brand, meet your needs and aspirations, and enable sustained growth is not an easy task! And when you consider the financial impact of upfront costs, one-time costs and recurring costs, the selection process becomes even more daunting. As you know, there is more than just the "buy." Choosing the right POS partner is a decision with long term consequences—one you live with for years to come.

Did you know that many questions in an RFP carry associated charges that are never discussed during the initial buy cycle? These "added surprises" are typically presented to you *after* the fact. My advice: tread carefully and make sure you try to cover as many bases as possible. If the vendor says, "Oh, it's covered," it must be put in writing! If the vendor doesn't or is reluctant to do so, it is *not* promised and you will be at their mercy soon after the "honeymoon" is over.

SOFTWARE

- Is the vendor's solution in-store server-based (traditional), fully cloud-based, or a hybrid of both?
- Can your POS run when there is an internet or server outage?
- Can you and your managers see data if there is an outage?
- What is the vendor's actual up-time performance?
- Does the vendor provide an SLA or just promise a "best effort?"
- If you are down, are there any refunds/compensation after a certain time period?
- How are lost revenues handled if at all? (most are not)
- Do you or your vendor control your software downloads? Are they pushed or can you opt in or out?
- How does the vendor handle custom dev requests? Or do they even allow it?
- What types of security are in place for your data—and that of your customers?
- Has the vendor had any recent data breaches?
- Does the vendor have any certifications for data security?
- Does the vendor have an in-house Security Team?
- How many people have access to your data?
- How is POS or network access restricted?
- If you are a franchisor, how is data segregated by franchisee?
- Who is responsible for maintaining that hierarchy? If vendor, what are the charges?
- Who owns your data? Does the vendor charge third parties to access and use your data?
- How much data can you store?
- What is the charge for storing data?
- Who tests your software for your environment?
- Does the vendor provide a test environment and is there a charge?
- Who maintains your test environment?
- How often are software updates provided?
- What if you do not have time to test each update? Can you defer taking the update?
- Is the vendor's software open source?
- Does the vendor have published APIs? Is there a charge?
- Is there a maximum number of stores before instances are split?
- If SaaS, is the software single tenant or multi-tenant?
- Are EMV credit card readers built-in or standalone? Are they integrated?

- Does the vendor have and support on line ordering?
  - Is the cost flat rate, percentage, or per order?
  - How are your POS menus kept in sync? By whom?
  - How does your vendor handle out of stock items?
- Does the vendor offer kitchen video systems?
- Does the vendor offer self-serve kiosks? Self-serve, drive-thru kiosks?
- Does the vendor offer integrated digital menu boards?
- Does the vendor offer POS-based customer-facing monitors?
- Does the vendor offer NVR camera systems? With text overlay?
- If your software is SaaS, can you host or does the vendor require hosting the software?
- How many data centers does the vendor have—and where are they located?
- Are data center charges like AWS passed-on or are they included in the fees?
- Does the vendor offer drive-through technology?
- Does the vendor handle table management?
- Is there a charge for software updates? If Saas, how often can subscriptions be increased?
- Are there fail over systems whether local or remote? Automatic or manual?

HARDWARE

- What hardware does the vendor offer? (All-in-one POS stations, tablet POS, self-serve kiosk POS, self-serve drive-thru POS, mobile)
- What platforms does the vendor's software run on? (Windows, Android, iOS, Linux)
  - If it can run on iPad, Android tablets, or Mobile, it is optimized natively?
- What type of warranty does your equipment come with?
  - What is the length of term?
  - What is free and what is extra?
  - Is next day, hot-swap offered?
- Does the vendor subscribe to embedded technology or is every buy a different chip set?
- How many different versions of hardware will the vendor certify and test on?
- Who does the vendor partner with for equipment?
- Can you run any hardware with the vendor's software?
- What is the SLA for broken hardware? Does the vendor have an in-house RMA department?
- How does the vendor handle equipment failures? New or refurbished equipment back?
- Does the vendor charge for wear and tear on equipment when it is returned?
- How many legacy versions back will the vendor test and support?
- What is the vendor's published failure rates? The manufacturer?
- Are the vendor's touch screens passive, resistive, infrared, or optical?
- Are EMV credit card readers on board or stand alone?
- How often and how does the vendor test new OS versions with core software?
- Does the vendor offer fingerprint readers for POS log-in/access security?
- How does the hardware get provisioned for restaurants?
- The vendor or store manager?
- To minimize out of box failures, etc. is all equipment staged and tested before being sent to the store?

GENERAL

- How long are current prices in effect? How often can they be increased?
- Who owns the use of software in case of a sale or merger?
  - How much notice is given when moves are forced?
  - How are the contracts that are in place handled with a sale or merger?
  - Can the new company cancel and leave you in the dark? Are there evergreen clauses to protect you?
- How much are set up fees? How much of set up is on-going?
- How much is installation? Is store wiring extra?
- How is training handled and who does it? What is the cost?
- How are access points and intranet handled? Who manages that environment?
  - How may access points are required for your restaurant?
  - What ISPs or other providers does the vendor partner with for those devices? One or many?
  - Is a VPN required and who owns and controls that environment?
  - What is the cost?
- What are the quoted rates for modifications to settings and custom development?
- How often can your menus be updated? By whom? What is the cost
- Do you get an account manager? If yes, is there a separate fee?
- Do you have to pay for escalations of business specific issues caused by changes to software?
- Does the vendor offer premium support services for a fee above normal help desk charges?
- What are the hours of the vendor's help desk? 24x7x365?
- Who staffs the help desk? In-source, out-source, dedicated employees?
- What are the severity definitions for problem resolutions? What is the SLA?
- How does the vendor handle maintenance on Data Center upgrades and operations?
- If the vendor has a mobile policy, how many prior versions are supported?

PCI

- Has the vendor been certified PCI DSS compliant?
- Is the vendor PIC QIR certified?
- Does the vendor provide full PCI compliance?
- Does the vendor offer remediation services? Is there an extra cost?

QUESTIONS? CALL ME AT 469-867-0763 OR EMAIL TIM.VAINER@PDQPOS.COM