

how to evaluate a potential supplier's service and support

When the time comes to select a technology provider, ensuring that provider meets your service and support requirements can help you avoid disappointment, regret, and risk down the road.

This guide details the types of questions you should ask during the selection process, why you should ask each question, and how to evaluate provider responses.



RFP questions to ask prospective technology suppliers

Here are 10 questions or requests you can include in a request for proposal (RFP), along with guidance to help you evaluate and compare prospective technology suppliers during the selection process.

RFP Request

Why This Is Important

How to Evaluate Answers

1. Existing Client Satisfaction

Please provide survey data on existing clients' satisfaction with your current provision of service and support.

Dissatisfaction is a leading reason for taking the significant step of changing technology providers, so ensuring that a prospective provider excels in this area is crucial.

- Look for evidence of a commitment to client satisfaction and continuous improvement, typically demonstrated by a comprehensive process for surveying client feedback.
- A high volume of survey data and high satisfaction scores are key indicators.

2. Support Case Resolution

Please provide feedback results from surveys or feedback requests sent to clients following a support case query.

Please include the averages and dispersion of case resolution times for the most recent three-month period.

Substandard or slow response times to issue resolution can have knock-on effects for your accountholders, eroding your brand and undermining loyalty.

- Compare both resolution times and feedback scores concerning issue resolution between the providers on your RFP list to evaluate the service and support culture of prospective providers.

3. Direct Communication

Do you provide direct communication to my representative, or is it initiated by ticketing?

Being unable to communicate directly with a representative to explain the nuances or a specific issue can result in misunderstandings and significant losses in time and resources.

- Look for the ability to communicate directly with the provider, rather than solely by ticket.
- If they do use a ticketing system, do they allow the ability to speak directly before initiating a ticket to ensure clarity?

4. Frequency of Communication

What is the cadence of communication with the strategic representative?

Infrequent or irregular contact with the provider's strategic representative can allow problems to fester or opportunities to enhance service to be missed.

- Look for a set cadence of direct and proactive communication with the strategic representative.
- This should be least monthly or offers the ability to customize the cadence to suit your specific needs.

5. Representative Tenure

What is the average tenure of your client relationship managers (CRMs) or customer service representatives (CSRs)? Please include the number of reps that have over 5 and 10 years of experience.

Experience matters. Inexperienced representatives can cause errors and delays in both conversion projects and issue resolutions.

- Evaluate the data for signs of high turnover, which might suggest a large proportion of inexperienced representatives.
- High turnover often points to deeper issues like workplace cultural problems or financial instability that could lead to staff reductions.

6. Client/Representative Ratio

What is the client-to-representative ratio?

From a service and support perspective, a high client-to-representative ratio will dilute the attention that each client receives from their representative.

- Look for a comparatively low client-to-representative ratio.
- This suggests a client focus and helps ensure you get the service and support you need.

7. Client Tenure

What is the average tenure of your client base for this solution? Of those, if applicable, what is the number/percentage of clients that have been with you for more than 10 or 20 years?

Client turnover suggests there could be issues with the provider. With survey data suggesting that service, support, and relationships are key components of decisions to change core providers, client turnover may suggest issues in those areas.

- Compare client tenure rates to discover the firm with high client satisfaction.
- If a provider has clients, particularly core clients, that have stayed for 10 or 20 years, it suggests deep satisfaction and an excellent service and support culture.

8. Support Team Structure

What would our relationship team structure look like for this solution? Which roles will be assigned to support the relationship?

A lack of clarity concerning support team structure, the roles of each member of that team, and a clearly defined escalation path can cause confusion and delays during both conversion and issue resolution events.

- Look for a mature, sophisticated, and comprehensive team structure that potentially includes different specialists to meet specific requirements.

Examples might include fraud reps, strategic reps, product reps, and an executive sponsor.

9. Advisory Group Participation

Do you offer advisory group participation? Please describe the program and how it works.

A lack of a client-participatory advisory group may indicate a lack of responsiveness to client input. An active advisory group offers a crucial conduit for feedback that helps keep a provider aligned with clients' needs and goals.

- Look for an active advisory council with representation from 10-12 clients of different sizes, tenures, and types to ensure diversity of perspectives.

uncover hidden risks to your tech stack

Poor service and support often creates unexpected risks across your technology stack. Explore those risks and their impact to your organization in [this article](#).

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