



Moving to a **Cloud Solution?**

35 Questions for You and Your Vendor





Executive Summary

Cloud computing is fast becoming the new way of working for many companies. **74%** of Tech Chief Financial Officers (CFOs) said it is the one thing that had the **most measurable impact** on their business in 2017.¹

Adopting Software as a Service (SaaS) is not for every organization; however, its growing acceptance does mean that avoiding the cloud is becoming increasingly difficult.

Consequently, it makes sense to thoroughly investigate the potential of using a cloud services provider for applications such as Customer Relationship Management systems. This whitepaper sets out a framework for doing so.



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Introduction

Each year, more companies are recognizing the benefits of the cloud, turning to Software as a Service (SaaS) and away from on-premise and desktop systems. In 2018 alone, according to research group Gartner¹, this will see the market for public cloud services **grow by 16%**.

Improved productivity, universal availability of information, cost-effectiveness and lack of installation are just some of the reasons it makes sense for so many organizations to adopt solutions like our own.

However, lingering concerns over data privacy and security continue to deter some businesses from taking a step that could bring a significant new dimension to their business. Often, suspicion of the cloud is based on a tendency to over-estimate the security of their own IT systems and consequent ability to contain customer data breaches, should the worst happen.

This is unfortunate given that cloud service providers are generally much better at protecting data than their in-house counterparts.

“ If someone asks me what cloud computing is, I try not to get bogged down with definitions.

I tell them that, simply put, **cloud computing is a better way to run your business.**”

Marc Benioff,

Founder, CEO and Chairman of Salesforce



However, entrenched resistance to cloud deployment is diminishing — **only 21%** of organizations think the cloud is riskier than traditional IT environments in comparison with **28%** the previous year, according to a CloudPassage security report.²

Of course, any computer connected to the Internet or a network is potentially vulnerable to outside threat. Seeking reassurance from your cloud provider about what they are doing to minimize potential risks is an essential precaution.

In this whitepaper, we'll propose 35 questions, across 9 areas, that you may want to ask before making a final selection on the most suitable product and vendor for you.

Section One:

Security

Cloud service providers should be making security their primary concern. After all, their whole business model is dependent on it. Recognizing this potential vulnerability is the reason why serious cloud providers invest so heavily in the talent and technology to protect their infrastructure.

In addition to their large spend on deeply embedded security measures that far exceed those of most other enterprises, SaaS providers are helped by the complexity of cloud operations themselves, which adds a further layer of security. So, even if cyber criminals know who your cloud provider is, they still must find and gain access to the right data center to compromise your information. That is no easy task. Because of these factors, businesses that store information on their own servers are actually more at risk than those who use the cloud to do so.

“52% believe cloud apps are at least as secure as on-premise applications, up from 40% last year.”

CloudPassage²





Q1. What firewall protection do you have in place?

Firewalls are the first line of defence between the Internet and your network, but never assume your internet service provider has one in place. In any event, personal firewalls should be installed on every computer that is connected to the Internet. Larger organizations may want to install firewall hardware as well. Other security measures will be needed to protect against viruses, spam, spyware and security 'back doors.'

Q2. Is Intrusion Detection (ID) security management in place?

Such systems can identify possible security breaches within a computer or network. This includes attacks from outside and misuse from within.

Q3. Do you use Secure Sockets Layer (SSL)?

These cryptographic protocols create secure channels between machines that are connected via the Internet or internal networks. SSL turns a website's address from insecure HTTP to secure HTTPS, where the information is encrypted and secured from interception.

Q4. Do you offer 24/7 security monitoring?

Large cloud providers have security teams, systems and tools constantly monitoring operations, meaning they have the ability to pick up potential problems earlier. Many organizations don't have round-the-clock surveillance of in-house IT, so it can take days or even weeks to spot a data breach.

Q5. Do your third-party organizations have certifications for security practices?

This can help prevent breaches or theft by ensuring that only authorized users have access to an application and related data. Some cloud service providers may be subject to regular audits from consulting firms that specialize in IT security to ensure their infrastructures are compliant.



Section Two:

Data Retention

Data is now the lifeblood of nearly every organization.

CRM applications, for example, feed on it voraciously, so any interruption to the flow can be highly disruptive. Consequently, the cloud service provider you choose must be able to guarantee that your offsite data is not only held in a way that is compliant with your industry's regulations, but is also readily available as and when you need it.





Q6. Do you guarantee data will never be shared with or sold to a third-party?

Data breaches destroy trust and are immensely damaging to a company's reputation. It is essential you know what policies are in place to ensure that confidential data will always remain that way.

Q7. How do you ensure data is only available to those authorized to access it?

If no robust retrieval protocols have been established, there is always the possibility of data being accessed either accidentally or intentionally by someone who shouldn't.

Q8. Will data be available at all times?

Round-the-clock accessibility should be a given. Having access to your data only at times dictated by a SaaS company is not acceptable.

Q9. Can data be downloaded in a variety of formats?

Being able to download data in a range of formats creates flexibility and helps ensure the value of your data does not diminish due to being trapped in an information silo.



Section Three:

Performance

No system is perfect.

Some downtime is unavoidable even with the most reliable of cloud service providers. However, frequent downtime is costly, deeply frustrating, and has consequences on your company in terms of its productivity and ability to serve customers or clients. If, for any reason, the IT service of an organization is cut off, it can be a corporate catastrophe. Consequently, you need reassurance from your cloud provider that they are doing everything possible to minimize the possibility of episodic downtime.

“Cloud is about **how you do computing**, not where you do computing.”

Paul Maritz,
CEO of VMware





Q10. What is your uptime percentage?

One of the most important cloud metrics is the percentage of time that a service or system is available. This should be a minimum of 99.5%. If there is any unreliability, business processes come to a halt and customers are left feeling distinctly underwhelmed, if not out-and-out furious. In other words, poor uptime stats can seriously damage your organization's reputation.

Q11. How would you deal with a catastrophic event, like a fire in your data center?

Data centers need to be sufficiently provisioned to survive a range of failure scenarios. Your cloud provider must have an effective data center recovery plan in place should the worst happen.

Q12. Do you have back-up servers to ensure there are no service disruptions?

Any piece of hardware can fail, in which case you don't want business to be disrupted while it is replaced or repaired. There should be secondary systems that kick in immediately.

Q13. Is there continuous performance monitoring in operation?

In a 24/7 business world, issues must be detected and addressed immediately. When minutes are critical, hour-long delays can be catastrophic. Does the cloud service provider offer this?

Q14. Will you get a refund if service level agreements (SLAs) are not met?

Your provider needs to understand and be willing to meet their obligations in the event of poor performance.



Section Four:

Support

Effective support isn't there just to help when something goes wrong; it enables you to get the most from the cloud service for which you are paying.

Lack of proactive support, or poor reactive support when you need it, affects productivity, hampers customer service levels and is frustrating for staff. Not surprisingly, lack of support is the deal-breaker that leads many companies to switch to other suppliers.





Q15. Can I test your product or service before committing to it?

Only by doing this will you will get a true sense of how difficult a service may be to use in practice and whether it meets your needs. Some CRM software is highly intuitive, so users learn quickly. Other platforms may require much deeper training because of their complexity.

Q16. Do you offer flexible support options?

You will want to ensure your team gets support in the way they need, whether that's through self-service, email, phone or online help.

Q17. Do well-trained, skilled professionals deliver the support?

Ideally, you want to speak with the fewest people possible when resolving a problem — having to go through a convoluted telephone or email triage before finding someone who can help is time-consuming and annoying.

Q18. Is there a comprehensive knowledge base for addressing simple queries and routine problems quickly?

Most users prefer not to use support services if they can handle a situation themselves. According to the Harvard Business Review, nearly two-thirds of customers expect their problem to be resolved the first time. That's why having access to video tutorials, FAQs and troubleshooting checklists is so appreciated. Of course, to be effective, this material needs to be presented in a way that's understandable to those who may not have a lot of technical expertise. So look for a CRM cloud provider who has taken the time to create a rich repository of useful material that communicates best practice and shares experience in an accessible way.

Q19. Can I submit support tickets?

Being able to submit support tickets gives continuity, transparency and accountability in a way that you don't get when communicating through email alone, for example, especially when it's with several different people.



Section Five:

Integration

For your business to be as effective and productive as possible, and offer the highest service levels to your customers, information can't be locked away in different databases. Instead, it needs to flow freely between applications.

But if you are to preserve your investment in existing on-premise applications, any new platform you introduce must be able to integrate with it easily. In this way you build an agile business that uses its data to greatest effect.

Q20. Is your product easy to integrate with other software?

Avoid vendors with limited integration capabilities, or those who have to carry out expensive and time-consuming custom coding to connect with third party products.

Q21. Do you use open, standard-based APIs?

This makes integration much simpler, faster and more cost-effective. So, ideally, look for a SaaS solution that uses standard-based APIs to link to your on-site systems. For instance, Act! uses industry standard REST API. This means it is able to integrate with 100+ plugins, Zapier, mobile apps on iOS and Android, as well as many accounting software packages.





Section Six: Usability

Ideally, you want to create a clean and simple SaaS environment that enables users to get up to speed as quickly and effectively as possible.

While every cloud service provider will tell you their solution is user-friendly, not all are actually as intuitive as you, the customer, would want them to be. And without good usability, the system will be harder to set up, leave users frustrated and produce uncertain results.

Q22. Can we test your application?

Ask your vendor for a hands-on demonstration or better still arrange a test-drive for yourself. Any good cloud service provider should be more than willing to arrange this for you.

Q23. Do you offer a free trial?

This will give you a real opportunity to see for yourself, in your own business environment, just how intuitive the interface is. For instance, you can trial Act! for 14 days, during which time we will provide all the help you need to find out whether Act! is for you. If it's not, that's not a problem – you will have a clearer picture of what might be the best sort of CRM for your organization.

“With the cloud, individuals and small businesses can **snap their fingers** and instantly set up enterprise-class services.”

—
Roy Stephan,
Founder and CEO of PierceMatrix





Section Seven:

Contractual Flexibility

Convenient, flexible contract options mean you can scale up cloud service provision as and when you need. That will enable you to make the best possible use of your budget and available resources.





Q24. What is your subscription mechanism?

While 'perpetual licences' that require up-front purchase for each user may still be preferred by some, monthly or annual subscription models that require no capital investment are increasingly popular. Act! is available on a subscription basis, which also helps to overcome the problem of obsolescence, with regular upgrades ensuring users have the latest version and continued compatibility with other products and operating systems.

Q25. Do you offer discounts for longer-term commitment?

Features such as two-year subscriptions may be on offer at a discount, enabling you to make your IT budget go further.

Q26. How easy is it to cancel the service, if that's necessary for any reason?

Being able to pull out of a contract at any time without penalty is of course ideal. However, commercial reality means that such flexibility isn't something many providers can offer. With that said, you will want to reduce the prospect of becoming locked in to a vendor for too long.



Section Eight:

Single or Multi-Tenant?

One key discussion you may need to have with your cloud provider is whether to opt for a multi-tenancy arrangement, where your data is kept on a communal database and tagged to separate it from that of others, or a single tenancy, where you have your own database and software. Your choice will be a trade-off between service, scalability, performance, security, reliability, customization and of course, cost.

“Line-of-business leaders everywhere are bypassing IT departments to get applications from the cloud (also known as Software as a Service, or SaaS) and paying for them like they would a magazine subscription. And when the service is no longer required, they can cancel that subscription with no equipment left unused in the corner.”

Daryl Plummer,
Managing Vice President, Gartner



Q27. Do you need scalability as a company?

If you are likely to require rapid changes in hardware or processing capacity, single tenancy is better.

Q28. Is high performance essential?

If it is, then having your own technology stack makes it easier to monitor, detect and correct any performance problems that arise. This is less easily done if you are in a multi-tenant arrangement.

Q29. Do you need the best possible security provision?

If so, single tenancy is better, as your data remains completely separate from anyone else's, so there's little chance of any other customer accessing it accidentally. Multi-tenant applications are more prone to security risks because every customer's data is kept inside a single database.

Q30. How reliable do you need the system to be?

Single tenant systems are usually more reliable: one customer's system isn't affected by another's, should their system go down. They are also easier to back up and restore than multi-tenant databases, as each client database has its own separate backup.

Q31. Do you need the most cost-effective option?

Economies of scale mean that those on multi-tenant agreements will benefit from lower subscription fees.

Q32. Is customization important?

Single tenant systems usually offer a greater range of customization options, which can give greater flexibility, as well as greater control over upgrades.



Section Nine:

Vendors

When considering CRM cloud solutions, it is important not just to compare products, but also to look at the companies behind them.

While the cloud computing market is still relatively immature, you need to check that your SaaS provider has a solid business model in place. This will help ensure they are able to meet your needs long-term.





Q33. How long has the vendor been in business?

Longevity shows that the product is sound and has proven itself to be adaptable to changing circumstances. With numerous Cloud vendors emerging every day, Act! is a trusted and proven vendor. Act! helped establish the CRM category and has been leading the way ever since, acquiring over six million users in 100+ countries.

Q34. What plans do they have for dealing with technological changes?

With cloud infrastructures and security systems continually developing, you will want to know that the vendor is keeping up. Ideally, you should use a vendor who has plans for developing their product in the future.

Q35. What is the vendor's reputation in the marketplace?

Researching others' experiences will give you an idea of how well a company might meet your needs. Is there an overall sense that they are easy to work with? What have their customers experienced when new product versions have launched? Have things gone smoothly?



What is Act!

Act! makes it easy to build **relationships that last** with quick, organised access to highly personalised customer details. Because every business runs differently, you have the freedom to tailor an Act! experience to your business and industry needs—your adaptable, everywhere, connected workspace. Finally, a CRM solution that's **uniquely yours**.

To learn more about Act! visit

Or call us on

Connect with Act!

866-873-2006

¹ [Roundup Of Cloud Computing Forecasts, 2017, Forbes](#)

² [Cloud Security 2016 Spotlight Report, CloudPassage](#)

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