



# Vendor evaluation worksheet

FOR SUBSCRIPTION MANAGEMENT

## Choosing the best solution for your business

The purpose of this worksheet is to help you determine which elements of a subscription management solution are most important for your business so you can select a provider that best meets your business needs.

**There is no one-size-fits-all approach to subscription management.** Every provider has different specialties, and every business has different goals.

What's more, every subscription offering has a unique customer base with its own needs and preferences—one that is directly impacted by the providers you choose.

It's important to work methodically and thoroughly when choosing your subscription management solution.

Whether you're new to subscriptions or looking to migrate, this approach will help set up your business up for long-term success and form lasting customer relationships. This tool can help facilitate the process for your business.



# Vendor evaluation worksheet for subscription management

## Analytics

Revenue overview and planning

Analytics dashboard

Customer overview

Subscription overview

Industry benchmarks

Customer actions

Revenue KPIs

Product dashboard

Media attributions

## Importance

High, medium, or low

VENDOR #1

VENDOR #2

VENDOR #3

## Ease of use

Exports

Out-of-the-box subscriptions solution

Ability to make changes at any time

Migration support

## Integrations

Shopify platform integration

Magento platform integration

BigCommerce platform integration

Tax partner integration

Retention tools integration

Upsell integration

Headless frontend integration

Payment processor integration

Customer service integration

Analytics integration

Shipping integration

Fraud integration

Email/marketing integration

Gifting integration

Inventory management integration

Loyalty integration

Referrals and affiliate integration

Subscription workflows integration

## Innovation & development

Reputable list of existing customers

Customer references and proof points

Funding and/or revenue invested back into the growth of the company

Product roadmap

Publicly listed uptime stats



## Merchant tools

Importance  
High, medium, or low

VENDOR #1

VENDOR #2

VENDOR #3

Out-of-the-box discount solutions

Out-of-the-box tax solutions

Out-of-the-box shipping engines

Out-of-the-box email notifications

Out-of-the-box customer retention strategies

Merchant admin portal

Robust and flexible APIs

SMS workflows

Custom checkout domain

## Payments

Payment processor support (Stripe, Authorize.net, and Braintree)

Payment method support (credit card, Apple Pay, Google Pay, PayPal SEPA, and iDEAL)

Secure payment vaulting

Ability to automatically notify customers when their credit cards expire

Ability to retry failed payments (custom interval)

Ability to pre-authorize transactions

## Quality of support

Dedicated account manager

Access to documentation

Guaranteed same-day response

Email support

Phone support

Dedicated launch partner

Introductions and partnerships with agencies

Annual industry conference

Slack support channel

High customer satisfaction rating

Ability to start migration immediately

## Customer tools

Customer portal

Ability for customers to add one-time products to a subscription order

Ability for customers to reschedule or skip deliveries

Ability for customers to swap products

Shopper SMS notifications

Customizable shopper portal

Ability to enable one-click upsells from email, SMS, and shopper portal

## Additional features

Fill in other features that are important to your business needs

