

A woman with dark, curly hair and black-rimmed glasses is smiling while holding a silver tablet. She is wearing a white button-down shirt. The background is a plain, light gray.

10 Questions To Ask Your TEM Provider Before Signing

A Telecom Expense Management (TEM) request for proposal (RFP) is a long and complicated process with many seemingly similar options to consider. TEM providers put their best foot forward to win the race, so it's important to ask the right questions to extract the important distinctions between vendors.

Here are the 10 big questions WidePoint recommends that you ask your top TEM providers before signing a contract.



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01

Question 1:

Where and how will my TEM data be stored?

If you're not concerned about data security, you should be. TEM data is a treasure trove for hackers. Employee lists with reporting hierarchies are perfect for executing social-engineering attacks, not to mention the harm a hacker can do with key executives' cell phone numbers. Ideally, your TEM vendor should store your data in a separate database instance and not commingled with other client data. This approach provides the greatest protection against accidental exposure to unauthorized users.

Offshoring is common in cloud-based solutions these days, but keeping your data stored in the same country as your primary operations and organizational headquarters ensures you'll have the greatest legal protection for your data.

Similarly, make sure the TEM vendor clearly identifies who in their company has access to your data and where those people are located. Providing access to your data to an offshore development team means the data is offshored as well.

Ensure that you retain rights to own your data. Ask the TEM vendor what their process is for offboarding clients and how data is transferred back to your company or your choice for a new TEM provider. Also ask what happens to your data on the TEMs servers once your engagement is over. How is it purged?

02

Question 2:

Do you outsource any part of the solution you are providing?

Outsourcing itself is not necessarily a bad thing. On one hand, this approach allows vendors to focus on core competencies

and broaden offerings into areas they may not be well-suited to handle. On the other hand, it's critical to understand what services are being outsourced and to what degree. Outsourcing by its nature means a loss of direct control and potentially a dependency on a vendor that you have not adequately vetted.

If part of the service is outsourced to a third-party provider and that company changes ownership or ceases operations, you'll have little direct say in how your services are affected. Make sure to specifically ask if the vendor owns their own platform or bases their solution on another company's platform. Again, it comes down to control and potential risk if the platform is not owned by the company providing the TEM servers.



03

Question 3: **How configurable is your TEM platform?**

And no, the answer “very” is not the response you are looking for. All platforms will have some level of configurability, but most have very definite limits. The last thing you want to hear as you begin to implement a new solution is, “Oh, that will take software development; you’re better off to just do it the way all of our other clients do it.” A lack of configurability typically results in a less than optimal solution or more money out of your pocket and lost time.

An aspect of configurability is whether the TEM vendor supports User Defined Fields or UDFs in their TEM platform. An important distinction to clarify is whether the UDFs are “free text” or can be configured based on lookup tables

for validation to make sure the data is consistent and structured for use in reporting. Free text UDF fields are typically easy to add and support, but they are a nightmare when it comes to creating useful reports based on the data they contain.

To avoid accepting compromises in how the TEM platform supports your unique environment, it’s critical to take a closer look at least in two key areas: portal access and workflow approvals.

Many TEM platforms provide portal access via a handful of distinct user roles. As long as your organizational stakeholders fit into these roles, everything works fine. However, it’s rare that all stakeholders who need access will fit neatly into one of the roles. The end result is either a user is given a role that provides access to data they normally should not see (not good), or their needs are met by a combination of portal access via more than one login or added special reporting, which makes their experience less than ideal.

With workflow approvals, a similar dynamic can occur. Most TEM platforms provide workflow approvals based on a straightforward managerial hierarchy based on the assumption that an

employee’s direct manager will approve. The real world is often more complicated. The approval-process flow may need to vary based on several factors including the dollar amount of the request, the order type, the type of equipment or services being requested, or even the part of the company the requestor belongs to. For approvals to move quickly and efficiently, all of these factors need to be configurable in the approval-process flow.

04

Question 4: **Will you charge me for creating custom reports?**

Many vendors will quickly respond that it’s unlikely you’ll need custom reports because their system has hundreds of standard reports and they meet the needs of most clients. You are not “most clients.” There’s a reason that end users

find it necessary to export data to Excel and roll their own reports, and it's not because the standard reports are meeting their needs.

If the vendor responds that they do charge for customizing reports, at least you know this information upfront and can factor those costs into your evaluation or budget. You may have to ballpark the number of custom requests needed, but you can be sure that the actual number will probably exceed your estimate, or you'll end up exporting to Excel a lot.

If the vendor responds that they don't charge for creating custom reports, drill down on what they will actually do for "free." For example, do they mean they will change the sort order, add/remove a column here or there, or will they actually create a report from scratch that perfectly suits the needs of the stakeholder?

In the long run, even if you have to pay for it, you will benefit from reports that are built into the TEM platform. When stakeholders find it necessary to create a "shadow reporting" environment in Excel, there's a risk that those Excel reports will be lost when turnover occurs in the position. If the reports are built into the

TEM platform, the new user will have online access and not have to learn how the Excel report "works."

05

Question 5:
How long has your company been in business?

Your organization should ask any TEM provider how long they've been in business. You want to find out whether the company you might be working with has been around a while or not. If the vendor has years or decades of experience with a good record of both staff and client retention, it's a good sign they know what they're doing. The TEM market isn't an easy industry to succeed in, so a good track record is important to your company's own success.

06

Question 6:
How large is your company?

The size of a TEM provider could signal how the company operates. For example, if a TEM vendor only has a handful of people, it's likely that they outsource much of their work. Depending on the size of your organization, can a small sized TEM provider handle your telecom demands?



07

Question 7:

What do you expect of our staff during our engagement?

Make sure to ask your TEM provider to be specific about expectations during the implementation and post-implementation phases. For good reason, most RFPs focus mostly on the client's expectations of their vendors with very little emphasis placed on the workload expectations for your telecom team after the contract is signed. It's not uncommon for an engagement to begin only for the client to discover that they're expected to dedicate significant time and resources, particularly during the implementation phase, to set themselves up for success. To avoid these surprises, get the expectations in writing and iron out how the vendor will support you through the gray areas.

08

Question 8:

Where do you see most implementations and programs stumble?

Ask your provider to identify the areas that most often lead to delays or other issues throughout a TEM engagement. How will they prevent those from happening this time and what is expected of you to achieve a seamless implementation?

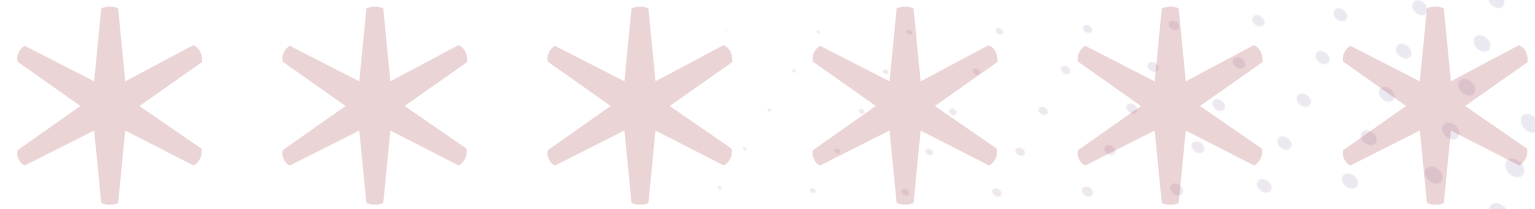
09

Question 9:

What are the most important factors for long-term success?

Be very attentive to your vendor's answer to this question. Does their answer make sense? Are they demonstrating a partnership mentality and that they are personally invested in your organizational well-being? Once you have their answer, it's time to ask the real questions: What are you going to do to make sure those factors are realized and what vendor resources will be available to my staff to ensure they get the support they need? What are you willing to put in writing?

10



Question 10:

When do I begin to see the savings?

One of the main benefits of a TEM solution is the cost-savings that will occur over time. In your first year under contract, set clear objectives and goals with your provider and get a clear understanding of expected return on investment (ROI) and timelines. All TEM providers will tell you that these savings will cancel out any partnership costs or implementation fees, and wind up benefiting your long-term bottom line. But what does long term mean, and how long is it? It's important now more than ever that you get your money's worth out of a partnership, so ask your TEM provider when you can expect these savings to be realized.

This questionnaire is just scratching the surface of what your organization should ask of different TEM vendors, but it does include questions that are rarely asked during the RFP process and are likely to get you some insightful answers that will help in the decision-making process. These questions are designed to set you up for success by establishing expectations and objectives upfront.

WidePoint is a trusted TEM provider for Fortune 500 organizations and government agencies alike. Request a consultation today to learn more about WidePoint's growing TEM use cases and their applications to your organization during this pandemic.

Contact us for a complimentary consultation today to learn more about TEM's growing use cases and their applications to your organization:

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