

Reference Call Agenda

FINAL VENDOR SELECTION STAGE

Purpose

As you narrow your shortlist of digital banking platform vendors, reference calls are one of the most valuable ways to validate your decision. These conversations offer real-world insight from institutions who have already gone through the evaluation, implementation, and early use of the vendor you're considering.

This guide provides a sample call structure and curated list of questions to help your team gather consistent, practical feedback across vendors. We recommend speaking with 2–3 reference clients per finalist, ideally with similar size, structure, and are on the same core as your financial institution if feasible.

Reference Call Agenda

Use this flexible agenda to guide a structured, productive reference call, plan for 45 minutes per call.

1. **Welcome & Introductions**
2. **Brief Overview of the Institution**
3. **Overview of their Evaluation Process (Who They Included & Deconverted From)**
4. **Initial Impressions of the Vendor & Why They Chose Them**
5. **Implementation Experience**
6. **Platform Experience & User Adoption**
7. **Vendor Relationship & Support**
8. **Lessons Learned & Final Advice**
9. **Wrap-Up & Thank You**

Key Questions to Ask

Implementation Experience

1. How would you describe your implementation experience with this vendor?
2. Was the project delivered on time and within scope? If not, what was the reason for the missed go-live?
3. Were there any unexpected challenges during migration or integration?
4. How well did they support your internal team throughout the process?

Vendor Responsiveness & Support

1. How responsive is the vendor to questions, issues, or requests post-launch?
2. How would you describe the quality of their client support?
3. Do you feel heard and prioritized by their team?
4. How do they handle escalations or critical bugs?
5. Have you noticed any changes in responsiveness since implementation?

Platform Reliability & User Adoption

1. Has the platform been reliable and stable since launch?
2. What has adoption looked like among your account holders?
3. What feedback have you received from staff and users?
4. Are there any features that didn't meet expectations?
5. Are there areas where you feel the platform excels?

Lessons Learned & Final Advice

1. What do you wish you knew before choosing this vendor?
2. If you had to do the evaluation again, what would you do differently?
3. Would you choose this vendor again today? Why or why not?
4. Any advice for our team as we make this decision?

