QUESTIONS YOU'LL WANT TO ASK DURING AN LP AUTOMATION DEMO

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Everybody loves a software demo.

This is especially true of LP Management Software where the thrill of catching some bad people can distract buyers from the reality of what it takes to automate an entire LP & Safety department and the inherently complex processes. We've outlined below a few questions that will help you get started evaluating your next LP management platform.

Tip: Don't forget that your work environment is unique. Instead of watching a standard demo according to a sample company, ask your vendor to show you how you can automate the exact processes you're managing today. This will give you much better insight into how the product will perform in your specific environment.

Questions to Ask & Why It's Important

#1
How do my stores submit incidents into the system?
Stores and other users without full access to the entire system should find it easy to access and fillout incident and other entry forms. When the forms are complete, it's also important to understand what options exist for workflow routing and reporting capabilities.

#2
How can I create my own reports and dashboards, and customize existing reports in the system? What types of users are able to create their own reports?
Reporting is an extremely important feature, and much of the business value derived from the product will be through the reporting capabilities. All types of users should be able to find it very easy to create their own reports and dashboards and modify them as necessary to visually find the information they are looking for quickly.

#3
How do I integrate my Store, HR and Metric data into the system, and what can I do with the information when it's stored within your software?
Having incidents and cases within an LP software tool is only the first step to ensure you have a comprehensive view of LP operations. Importing HR, store, and other operations metrics like sales, shrink, and other business results along with the ability to report and relate all the information together is critically important to analyzing shrink and loss patterns.

#4
What is unique about your product in comparison to all the other LP automation tools available in the market?
Every product has their own strengths – find out what is uniquely beneficial of the product and make sure there is an alignment between your needs and the product you're evaluating.

#5
Can I use my smartphone or tablet with the software, and what are the capabilities?
Just about everyone now had a smartphone and/or a tablet device, and with most LP professionals on the road, it's imperative that these types of systems are easily accessible via mobile devices. Find out what capabilities exist for mobile access to the software.

#6
How would my team members collaborate with each other to conduct and solve complex investigations?
Most businesses have a team of professionals investigating and following-up on incidents. Many LP management tools only offer data collection and reporting, and having a more comprehensive collaboration feature where your users can discuss issues and educate each other within the normal flow of business (instead of more and more meetings) can offer a sizable productivity boost.

#7
How do I manage access and security rights for different types of users and different departments who have access to the software?
One important task for your system administrator is to setup and manage user security controls. Make sure that it's easy for the administrator to conduct this task, and that there are comprehensive and fine-grained options such as role, profile, record, and field-level access controls. Different departments and different types of users from different departments should have unique access rights.

#8
How do I manage the workflow processes within the system and setup automated task creation or e-mail notifications?
When events occur, companies often follow a set of standard processes to facilitate the completion of an investigation or review of the incident report. Some of these processes can be automated in the software, including automatically assigned tasks, email notifications to certain personnel, and more complex processes like escalations and approvals and combinations thereof. System administrators should be able to easily & fully manage these processes.

#9
Can I send and receive SMS Text Messages as part of an Alert Line within the software?
Setting up an LP management cloud with all the information stored in the central repository is a key benefit of this type of software. Surveys show that most people under the age of 34 don't prefer to call phones including Alert Lines, so having an SMS option that directly links to your incident management software helps obtain more tips from younger employees.

#10
Can my historical data be imported into the system so that I don't have to re-start my data collection efforts?
Almost every organization already has a list of their current incidents and related data – either in existing LP software tools or in files like Excel. This data is usually extremely important to carry forward into any new tool, and your vendor-partner should be able to import it into the system for you.

#11
How often is the product upgraded and how is the product upgrade process managed?
Software products should constantly be upgraded with new features and enhancements. The vendor should be able to clearly articulate a robust product roadmap with plans for future enhancements. The upgrade process should be smooth for customers, offering minimal to no downtime during the upgrade, with no risk of loss of any customizations your organization has completed within the software.

#12
Other than LP & Safety Incidents and Case tracking, what other features does the software include?
A comprehensive management solution includes a variety of features and capabilities. It's important to understand all the available components that are available that you may use today or need to use tomorrow.

#13
How do you ensure my data is secure and available 24x7?
LP systems include an enormous amount of confidential and personally-identifying information. Ask what has been done to certify that the data is protected, and that it has been independently certified by an external regulatory body. Also understand the security controls surrounding the vendor employees' ability to access your data.

#14
Who owns the data created within the system, and how do I obtain my data if I choose to stop using the product?
The customer should always own and have complete access and control of the data stored in the system. Make sure that you can always obtain your data for either backup or extraction purposes without any additional fees.

#15
How much downtime have your users experienced in the last 12 months and what system performance level reports do you provide your users?
Most organizations require 24x7 accessto LP systems that manage critical incident issues, and any downtime is costly in terms of potential increased liability, lost productivity and program reputation loss. Vendors should be able to precisely report on system availability and performance levels and provide transparency to their system operations.

#16
How quickly can I have the system deployed for my users?
Different systems take a different amount of time to setup and configure. There is usually a correlation between the amount of time it takes to deploy the site and the ease of which it is to manage the system after deployment.

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