



FREE CHECKLIST

IT Vendor Evaluation Checklist

Questions to ask before you sign with any technology vendor, from software platforms to service providers.

INSIDE

42 questions in 7 areas · a side-by-side scoring sheet · red flags to watch for

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HOW TO USE THIS CHECKLIST

Most vendor decisions get made on a demo and a price. The problems show up later: in the contract, the integration, the support queue, or the day you try to leave.

Use these questions with every vendor on your shortlist. Ask for answers in writing, score each area on the sheet at the end, and keep the completed checklist with the contract. You won't need every question for every purchase. A small single-user app needs less scrutiny than a platform that will hold your client data for years.

Tip: decide what "good" looks like before the first demo. Write down the three outcomes you need from this purchase. It's much harder to judge a vendor fairly after you've seen the polished version.

1. Fit with your business

- ☐ Which of our three required outcomes does your product handle out of the box, and which need configuration or add-ons?
Separates what's included from what's possible with extra work.
- ☐ Who are your typical clients by size and industry? Can you share two references close to our size?
- ☐ What does a successful first 90 days look like for a business like ours?
- ☐ What will we still need to do ourselves, or buy from someone else, to get the result we want?
- ☐ What's on your roadmap for the next 12 months, and how do clients influence it?
- ☐ How many of your clients have stopped using the product in the last year, and why?

2. Integration with what you already use

- ☐ Which of our current systems does this connect to natively? Please list each one.
"We have an API" isn't the same as a working integration.
- ☐ For anything without a native connection, who builds and maintains the integration, and at whose cost?
- ☐ How does data move between your system and ours: real time, scheduled, or manual export?
- ☐ What happens to the integration when either system updates?
- ☐ Does the product support single sign-on with our identity provider?
- ☐ Who do we call when data doesn't line up between systems?

3. Security and data handling

- ☐ Where is our data stored, and who at your company can access it?
- ☐ Is data encrypted in transit and at rest?
- ☐ Do you support multi-factor authentication for every user, and can we require it?
- ☐ Which independent security reports or attestations can you share, and how current are they?
Ask for the report itself, not a logo on a web page.
- ☐ How and how quickly do you notify clients of a security incident that affects their data?
- ☐ Which subcontractors or other providers process our data?
- ☐ Can you meet the specific requirements our contracts, insurer or regulators place on us? Please answer in writing.

4. Support and service

- ☐ What support hours and channels are included in the price we're quoted?
- ☐ What are your response and resolution targets, and what happens if you miss them?
- ☐ Will we have a named contact, or do we go through a general queue?
- ☐ How is onboarding handled, and how long does it usually take?
- ☐ What training is included for new staff after go-live?
- ☐ How do you communicate planned changes and outages?

5. Cost over time

- ☐ What's the total cost over three years, including setup, licenses, add-ons, storage and support?
The first-year price is rarely the price you'll pay in year three.
- ☐ How do prices change as we add users, locations or data?
- ☐ What price increases are allowed at renewal, and how much notice do we get?
- ☐ Which features would we lose if we moved to a lower tier later?
- ☐ Are there one-time costs for implementation, data migration or custom work?
- ☐ What internal staff time will this take to run each month?

6. Contract terms

- ☐ What's the contract length, and does it renew automatically?
- ☐ Can we start month to month or with a shorter term while we confirm fit?
- ☐ What are the termination terms, including notice periods and early-exit fees?
- ☐ Who owns the data, configurations and documents we create in your system?
- ☐ What service commitments are written into the contract, not just the sales materials?

7. Leaving later

- ☐ How do we export all of our data, and in what format?
- ☐ Is there a cost or a time limit for getting our data out at the end of the contract?
- ☐ Will you help with the transition to another provider?
- ☐ How long do you keep our data after we leave, and how is it deleted?
- ☐ What would make switching away from you difficult for a business like ours?
A good vendor will answer this honestly.
- ☐ Who is accountable on your side if the exit doesn't go to plan?

Red flags to watch for

Vague security answers

No written answers, no current reports, or "we take security seriously" in place of specifics.

Integration by promise

Connections that are "on the roadmap" or depend on custom work nobody has priced.

Hard-to-leave terms

Long automatic renewals, steep exit fees, or no clear way to export your data.

Pressure to sign fast

Discounts that expire before you can check references or read the contract.

No references your size

Every example client is far larger or smaller than you are.

Unclear ownership

Nobody can say who owns your data, configurations or documents.

Side-by-side scoring sheet

Score each area from 1 (poor) to 5 (strong) for each vendor. Weight the areas that matter most to this purchase.

Area	Weight (1–3)	Vendor A	Vendor B	Vendor C
Fit with your business				
Integration				
Security and data handling				
Support and service				
Cost over three years				
Contract terms				
Leaving later				
Weighted total				

Weighted total = the sum of (weight × score) for each area.

Want a second opinion before you sign?

Vendor choices add up. As a Managed Technology Provider, Balancelogic keeps track of how every platform and provider fits together, so each new decision supports the whole technology function rather than adding another silo.

Book a free IT Strategy Session. Bring your shortlist and we'll go through it with you.

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