

# IT Vendor Evaluation Checklist

## Section 1: 10 Must-Ask Questions for Every Vendor Call

- What is the most recent real-world use case—at a company of our size and industry—that you solved, and what measurable outcome did you deliver?  
*(Look for specifics, not hypotheticals or generic answers.)*
- Can you walk me through the full implementation timeline for a customer like us—including what typically causes delays or bottlenecks?  
*(Watch for transparent acknowledgment of common challenges.)*
- Which systems, platforms, or tools have you successfully integrated with in the past 12 months? Can you provide a technical reference or documentation for that integration?  
*(If they hedge on specifics, integration might be more difficult than they claim.)*
- Who owns the data (including backups and logs) in your platform, and how do you support customer data export or migration if we choose to leave?  
*(This checks for vendor lock-in and data transparency.)*
- What are the three most common reasons customers leave your platform, and how have you addressed those issues?  
*(Honest vendors will admit where they've lost business and what they've learned.)*
- Can you describe your support escalation process and share actual SLA metrics from the past quarter (e.g., average response time, resolution rates)?  
*(Look for real data, not just promises.)*
- How do you handle critical security incidents or breaches? Can you share a recent example and your communication protocol with customers?  
*(Force them to show their process and transparency.)*
- What is included in your quoted price, and what additional costs—services, modules, maintenance, or increased usage—have surprised customers in the past?  
*(Press for hidden or variable costs.)*
- How is your product roadmap influenced by customer feedback, and can you share a recent feature that was added or improved based on client input?  
*(This shows whether they actually listen to and act on customer needs.)*
- If we were to ask for three references at companies similar to ours, would you be able to provide direct contact information for project leads—not just C-suite or sales champions?  
*(Push for access to real users, not handpicked superfans.)*

**Tip:** Listen for hesitation, vague answers, or “we can get back to you.” The more specific and transparent their response, the lower your risk and the better the fit.

## Section 2: Quick Red Flags—Listen for These Answers

- Q: “Can you share a recent customer story in our industry?”

✗ “Well, we work with lots of companies, but I’d need to check if we have one exactly like yours...”

- Q: “Who can we speak with for a customer reference?”

✗ “We typically don’t provide references until late in the process or after an NDA is signed.”

- Q: “How does your platform integrate with [our system]?”

✗ “Our solution should work with any system. Integration is really straightforward for most customers.”

- Q: “Can we see a sample invoice or all-in pricing?”

✗ “Our pricing is customized for each client, so it’s best discussed after the demo.”

- Q: “What support options do you provide, and what’s your average response time?”

✗ “We have email support, and response times vary—usually within a few days. For outages, we’ll do our best.”

- Q: “What certifications or compliance standards do you meet?”

✗ “We take security seriously, but we don’t have formal certifications right now. We’re working on it.”

- Q: “If we needed to leave, how would we get our data exported and deleted?”

✗ “We can provide exports, but there might be additional costs. Data deletion takes time and depends on the request.”

- Q: “What’s the most common reason customers leave you, and what have you done to address it?”

✗ “Honestly, customers only leave if they outgrow us, or it’s something on their side.”

- Q: “How do you handle new feature requests or product feedback?”

✗ “We’re always open to ideas, but roadmap decisions are made by management and aren’t usually shared externally.”

- Q: “Why should we choose you over a competitor?”

✗ “We can do anything you need—just tell us what you want!”

### Other red flag phrases:

“Let’s not get bogged down in details right now.”  
“We’ll send documentation after you sign.”  
“That’s never been a problem for anyone else.”  
“You need to sign before we can give you that information.”  
“If you don’t act this week, pricing will change.”

If you hear answers like these, dig deeper—or move on.

## Section 3: 15-Minute Vendor Scoring Grid

**Instructions:** Score each item from 0–2 (0 = No/Red Flag, 1 = Partial/Uncertain, 2 = Yes/Excellent). Tally your total for a quick fit assessment.

(For print/PDF: fields remain fillable and the total auto-updates.)

Criteria	0 (No/Red Flag)	1 (Partial/Unclear)	2 (Yes/Strong)	Score
Clear, recent use case for your industry/size	✗ None/vague	Somewhat/old	✓ Specific & recent	<input type="text"/>
Honest about customer churn/issues	✗ Evasive/denies	Admits, vague fix	✓ Candid, shows fixes	<input type="text"/>
Transparent, detailed pricing	✗ Avoids/unclear	Partial/upcharges	✓ Full, all-inclusive	<input type="text"/>
References provided before late stage	✗ No	Only after NDA	✓ 2–3 real users given	<input type="text"/>
Proactive on integration details	✗ Vague/“should work”	Partial, few docs	✓ Docs, case studies	<input type="text"/>
Security and compliance explained	✗ No proof, evasive	Some info	✓ Certs, incident plan	<input type="text"/>
Data ownership/export policy	✗ Unclear	Some info	✓ Clear, documented	<input type="text"/>
Responsive, multi-channel support	✗ Email only, slow	Live, some delays	✓ Fast, phone/live, SLAs	<input type="text"/>
Product roadmap/customer feedback	✗ No process, hidden	Ad hoc, vague	✓ Open, track record	<input type="text"/>
No major red flags in answers	✗ 2+ red flags	1 red flag	✓ None	<input type="text"/>
TOTAL				0

### How to Interpret Your Score:

- 18–20: Outstanding Fit – Move to deep evaluation!
- 14–17: Promising – Proceed, but clarify any 1s or red flags.
- 10–13: Caution – Multiple gaps; dig deeper before next steps.
- 0–9: High Risk – Likely not a good vendor fit for your needs.

**Tip:** Any “0” on Security/Compliance, Data Ownership, or Major Red Flags is a dealbreaker regardless of total score.

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