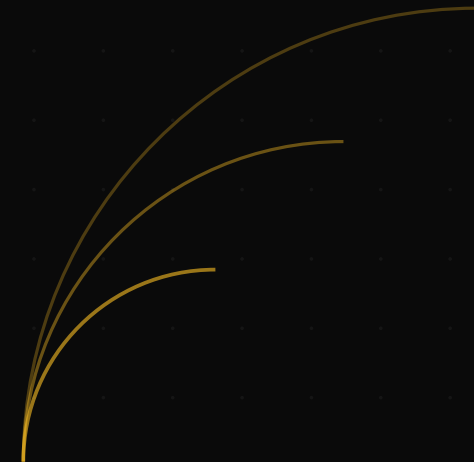


ANYONE RUNNING A VENDOR EVALUATION

Questions to ask a software vendor before signing

The questions that expose risk, hidden cost, and uncommitted claims - grouped by scope, data, integration, licensing, support, security, and exit.



A good question comes with a good answer and a red-flag answer so you can read the room even outside your specialty.

WHAT'S INSIDE

6 steps in this guide

01 Scope & requirements

02 Data migration

03 Integration

04 Licensing & commercial

05 Resourcing & support

06 Security & compliance

01

Scope & requirements

Pin down exactly what is and isn't included before price is discussed.

- What specifically is excluded from this fixed price, and what would each exclusion cost?
- Which requirements are you assuming we'll handle internally?
- What triggers a change order, and is there a cap on change-order spend?

02

Data migration

The most under-scoped phase in almost every implementation.

- Who is responsible for data cleansing - you or us - and is it in this price?
- How many records, and what's the rollback plan if migration fails at cutover?
- What format is our data returned in on exit, at what cost, on what timeline?

03

Integration

Each integration point is a project, not a line item.

- For each integration, is there a data contract, error handling, and UAT plan?
- What are the API rate limits, and what happens when we hit them in production?

04

Licensing & commercial

Where renewal surprises are born.

- How is licensing metered (named vs concurrent), and what triggers a true-up?
- What is the contractual cap on renewal price increases?

05

Resourcing & support

The people who sell are rarely the people who deliver.

- Will the named consultants in this proposal be the ones assigned, with a substitution clause?
- What does post-go-live hypercare include, for how long, and at what staffing level?

06

Security & compliance

Map controls to your obligations, not just to certificates.

- Where is our data hosted and processed, and is it encrypted at rest and in transit?
- Can you map your controls to our specific compliance obligations?

PUT THIS TO WORK

Walk into every evaluation with the vendor's own playbook.

- A vendor-proof scope, issued before any proposal
- Gap analysis scoring every proposal against your scope
- A risk-weighted interrogation kit for the vendor meeting
- Scope-drift detection across proposal versions

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