

Fit-First Vendor Scorecard

Score every vendor on what actually matters — before the sales pitch takes over.

WHAT THIS SCORECARD DOES

Most technology decisions get hijacked by a flashy demo. This scorecard gives you an objective, weighted scoring system across 6 fit dimensions — so you can compare up to 3 vendors on your terms, not theirs. Score each vendor on its own, then let the numbers point to your shortlist before you ever sit down to negotiate.

HOW TO USE IT

1 Set your weights first

In the Setup page, give each of the 6 dimensions a weight from 1–3 based on your priorities. A “3” is a must-have; a “1” is nice-to-have.

2 Score one vendor at a time

Work through all six sections for one vendor before starting the next. Score each line 0–5 using the simple guide on the Setup page.

3 Let the totals do the talking

Open in the free Adobe Acrobat Reader and every subtotal, weighted score and percentage adds up for you. The highest score is your best fit — not always the cheapest.

4 Pair it with your TCO

Bring in your Step 2 TCO Calculator. Best fit + lowest 3-year cost is your strongest hand walking into any vendor conversation.

Time to complete
20–45 min per vendor

Works best with
3 vendors, one sitting

Pair with
Step 2 TCO Calculator

Start here: tell us about the decision, then set your priorities.

Everything else on this scorecard flows from the weights you set below.

EVALUATION DETAILS

Business / organization

Technology being evaluated

Prepared by

Date

THE 3 VENDORS YOU'RE COMPARING

Enter once here — your three vendors carry through the whole scorecard.

1

2

3

SCORE EACH LINE 0-5

- 5** Excellent fit — fully meets this need
- 4** Strong fit — minor gaps
- 3** Partial fit — works with workarounds
- 2** Weak fit — significant gaps
- 1** Poor fit — does not meet this need
- 0** Not evaluated / not applicable

HOW WEIGHTING WORKS

Weight x Score = the points each line earns.

- 3 = Must-have — critical to your business
- 2 = Important — strongly preferred
- 1 = Nice-to-have — helpful but optional

Set weights once, below. They apply to every vendor, so the comparison stays fair.

Pre-set to 2 (Important) — just adjust to fit.

SET YOUR 6 DIMENSION WEIGHTS

DIMENSION	WHAT IT CHECKS	WEIGHT
B Core Feature Fit	Does it do what you need?	<input type="text"/>
C Ease of Use & Adoption	Will your team use it?	<input type="text"/>
D Integration & Tech Fit	Works with what you have?	<input type="text"/>
E Vendor Reliability	A vendor you can trust?	<input type="text"/>
F Support & Service	Will they help you?	<input type="text"/>
G Scalability & Growth Fit	Will it grow with you?	<input type="text"/>

Score 0–5 for each vendor. Leave the dropdown on “-” for anything you haven’t checked yet.

B Core Feature Fit	<i>Does it do what your business actually needs?</i>		
WHAT TO CHECK	VENDOR 1	VENDOR 2	VENDOR 3
Must-have features are all present <i>List any gaps in your notes</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Features match how you actually work <i>Not just the polished demo scenario</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
No key feature locked behind a higher tier <i>Ask: “Is this included in my plan?”</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Reporting & dashboards meet your needs <i>Do you need custom reports?</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Mobile / remote access works well <i>Field team, travel, or remote staff?</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Automation that saves your team real time <i>Are your key tasks automated?</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Section B subtotal <i>(adds up your 0–5 scores — max 30)</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>

C Ease of Use & Adoption	<i>Will your team actually use it?</i>		
WHAT TO CHECK	VENDOR 1	VENDOR 2	VENDOR 3
Easy to learn — low learning curve <i>Can non-tech staff use it on day 1?</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Setup & onboarding is manageable <i>Hours to get going, not weeks?</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Free training resources are available <i>Videos, guides, live help?</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Works on the devices your team uses <i>Desktop, tablet, phone?</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
User roles & permissions are easy to manage <i>Need to control multiple users?</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Section C subtotal <i>(adds up your 0–5 scores — max 25)</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>

TIP

Score one vendor straight down both sections before you start the next — it keeps your judgment consistent. Leave a line on “-” if you haven’t checked it; it counts as zero until you do.

Score 0–5 for each vendor. Leave the dropdown on “-” for anything you haven’t checked yet.

D Integration & Tech Fit		<i>Will it work with what you already have?</i>		
WHAT TO CHECK	VENDOR 1	VENDOR 2	VENDOR 3	
Connects to your current CRM / sales tools <i>Ask the vendor for their integration list</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Connects to your accounting / finance system <i>QuickBooks, Xero, and the like</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Connects to email / calendar / chat <i>Gmail, Outlook, Slack, Teams</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
API access is available if you need it <i>Do you need it now or later?</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Easy to bring your existing data in <i>What format? Any cost to import?</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
You can export your own data freely <i>No lock-in on data you own</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Section D subtotal <i>(adds up your 0–5 scores — max 30)</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

E Vendor Reliability		<i>Is this a vendor you can trust long-term?</i>		
WHAT TO CHECK	VENDOR 1	VENDOR 2	VENDOR 3	
Company is stable & established <i>Years in business? Funding?</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Strong track record with businesses your size <i>Small business references available?</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Honest, transparent pricing — no hidden fees <i>Did the quote match your TCO?</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Clear roadmap & active development <i>Are feature updates regular?</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Contract terms are fair, not punitive <i>Exit clause? Who owns the data?</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Security & compliance you actually need <i>SOC 2, GDPR, HIPAA — if required</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Section E subtotal <i>(adds up your 0–5 scores — max 30)</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

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F Support & Service		<i>Will they help you when things go wrong?</i>		
WHAT TO CHECK	VENDOR 1	VENDOR 2	VENDOR 3	
Live support when you need it <i>Phone, chat, or email?</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Support is included in your base plan <i>Or is it a pricey add-on?</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Real onboarding help — not just videos <i>Hands-on setup support?</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Active user community / help center <i>Can you self-serve answers?</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Clear response-time guarantee (SLA) <i>How fast will they reply?</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Section F subtotal <i>(adds up your 0–5 scores — max 25)</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

G Scalability & Growth Fit		<i>Will it still work as your business grows?</i>		
WHAT TO CHECK	VENDOR 1	VENDOR 2	VENDOR 3	
Handles 2x your current number of users <i>Without a big price jump?</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Grows with your business stage <i>Startup vs. a 50-person team?</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Supports multiple locations / teams <i>If expansion is in your plan</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Clear, fair upgrade path <i>Advanced features when you need them?</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Proven at your next growth stage <i>Customer stories at that size?</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Price-to-value holds as you grow <i>Per-seat cost at 2x users?</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Section G subtotal <i>(adds up your 0–5 scores — max 30)</i>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

DEAL-BREAKERS & NOTES

Anything a score can't capture — an absolute no, a contract red flag, a gut concern.

Vendor 1

Vendor 2

Vendor 3

Your scores roll up here automatically in Adobe Acrobat Reader. Highest total = best fit.

WEIGHTED SCORE BY DIMENSION					
DIMENSION	MAX	WT	score x wt	score x wt	score x wt
B Core Feature Fit	30	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
C Ease of Use & Adoption	25	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
D Integration & Tech Fit	30	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
E Vendor Reliability	30	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
F Support & Service	25	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
G Scalability & Growth	30	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
TOTAL WEIGHTED SCORE			<input type="text"/>	<input type="text"/>	<input type="text"/>
max possible:			<input type="text"/>	<input type="text"/>	<input type="text"/>
FIT SCORE (% of max)			<input type="text"/>	<input type="text"/>	<input type="text"/>
FIT RATING			<input type="text"/>	<input type="text"/>	<input type="text"/>
BEST FIT — highest weighted score			<input type="text"/>		

WHAT YOUR FIT SCORE MEANS

- 80%+ Strong fit**
Lead candidate — move to final talks
- 65–79% Good fit**
Strong contender — close the gaps first
- 50–64% Marginal**
Proceed with caution — negotiate hard
- <50% Poor fit**
Serious concerns — only if no better option

YOUR DECISION

Pair best fit with your lowest Step-2 TCO, then choose one:

- GO** Advance to Step 4 — Real-World Test
- HOLD** Get more demos / pricing first
- STOP** No vendor clears the bar — reset

SIGN-OFF	Prepared by	Approved by	Date
Recommendation → Step 4	<input type="text"/>	<input type="text"/>	<input type="text"/>

NEXT → Step 4: Real-World Test Scenarios
Put your top 1–2 vendors through a hands-on trial before you sign anything. bizhealth.ai/biztools/technology