Systems Evaluation Template

# Objectives

*Instructions: Make a list of the reasons why you are looking for a new system. These are driven by your pain points and aspirations for a better way to do things.*

| Objective | Comments |
| --- | --- |
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# Functional Requirements

*Instructions: Make a series of requirements categories. You can expand on this and regroup items as you go and learn new things. There is no set rule on how many requirements can be in a category, or how many categories you may have. As you work through demos, you may want to just write notes at the bottom and then fill in the boxes later.*

## Requirements Category 1

| Requirement | System 1 | System 2 | System 3 |
| --- | --- | --- | --- |
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*Instructions: Make a list of specific requirements. This can be in the form of either a statement or a question. You can modify this list as you go and learn new things. In each box for the line item, make sure to answer yes, no, maybe or don’t know. Add comments to provide more details. Once you have filled in the boxes, colour code them to make it easier to see which system fits best. Make every box where you put ‘Yes’ green, every box where you wrote ‘Maybe’ orange, and every box where you wrote ‘No’ Red. Leave the one where there is a lack of clarity white, so they stand out.*

## Requirements Category 2

*Instructions: Make a list of specific requirements. This can be in the form of either a statement or a question. You can modify this list as you go and learn new things. In each box for the line item, make sure to answer yes, no, maybe or don’t know. Add comments to provide more details. Once you have filled in the boxes, colour code them to make it easier to see which system fits best. Make every box where you put ‘Yes’ green, every box where you wrote ‘Maybe’ orange, and every box where you wrote ‘No’ Red. Leave the one where there is a lack of clarity white, so they stand out.*

| Requirement | System 1 | System 2 | System 3 |
| --- | --- | --- | --- |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

## Requirements Category 3

*Instructions: Make a list of specific requirements. This can be in the form of either a statement or a question. You can modify this list as you go and learn new things. In each box for the line item, make sure to answer yes, no, maybe or don’t know. Add comments to provide more details. Once you have filled in the boxes, colour code them to make it easier to see which system fits best. Make every box where you put ‘Yes’ green, every box where you wrote ‘Maybe’ orange, and every box where you wrote ‘No’ Red. Leave the one where there is a lack of clarity white, so they stand out.*

| Requirement | System 1 | System 2 | System 3 |
| --- | --- | --- | --- |
|  |  |  |  |
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|  |  |  |  |
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# Vendor Specific Overall Analysis

*Instructions: You may not feel the need to do this for all vendors, but you may want to summarize your group’s impressions of each vendor. You can talk about strengths and weaknesses, identify major deficiencies, talk about how confident you are in their ability to meet their claims, or cite references about this vendor that may strengthen or weaken their case for being chosen.*

#### Analysis of Vendor 1

*Instructions: Write commentary about how well each vendor meets your needs and anything else that should be known.*

|  |  |  |
| --- | --- | --- |
| Cost Category | Cost | Comments |
| Implementation Cost |  |  |
| Annual Fees |  |  |
| Custom Report |  |  |
| Custom Integrations |  |  |
| Other Professional Services |  |  |
| Total |  |  |

#### Analysis of Vendor 2

|  |  |  |
| --- | --- | --- |
| Cost Category | Cost | Comments |
| Implementation Cost |  |  |
| Annual Fees |  |  |
| Custom Report |  |  |
| Custom Integrations |  |  |
| Other Professional Services |  |  |
| Total |  |  |

#### Analysis of Vendor3

|  |  |  |
| --- | --- | --- |
| Cost Category | Cost | Comments |
| Implementation Cost |  |  |
| Annual Fees |  |  |
| Custom Report |  |  |
| Custom Integrations |  |  |
| Other Professional Services |  |  |
| Total |  |  |

# Assessment & Recommendation

*Instructions: Write a brief overview to introduce what you are about to analyze. This is relatively free form, so you can make this short. If you are not sure what to write, skip it and come back to it later. After this, you should complete a comparative analysis of how the vendors perform in each major category. You should also identify who is the strongest and weakest in each category if it is clear. If not, you may find that they are relatively equal. You must think critically to generate high quality insights.*

#### Comparative analysis of requirements 1

#### Comparative analysis of requirements 2

#### Comparative analysis of requirements 3

#### Overall Recommendation

*Instructions: This is the most important section of the report. It is where you make your final recommendation for who you think should be chosen. Be sure to clearly articulate why. Refer to the objectives we identified at the beginning of the report. You should include a cost comparison here. I have put a table below to help you organize this information.*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| *Vendors* | *Implementation Cost* | *Annual Cost* | *Other Costs* | *Total* |
| *System 1* |  |  |  |  |
| *System 2* |  |  |  |  |
| *System 3* |  |  |  |  |

# Additional Insight

*Instructions: This is your chance to add anything else that does not fit in the rest of the document. You may want to talk about other considerations for long term planning, or anything that comes to mind.*