FROM THE MAP, TRIAGE, HOLD FRAMEWORK

Vendor Evaluation Scorecard

HOLD Score a tool before you commit to it.

A scorecard that produces a feeling instead of a number changes nothing. This one produces a number, and it makes you clear the dealbreakers before you are allowed to like the demo.

Step 1. Dealbreaker screen. If any is true, stop. Do not score it.

- ▢ We cannot export our own data in a usable format without the vendor's help.
- ▢ It trains on our data and there is no opt-out.
- ▢ No one on our team will own it.
- ▢ It duplicates a tool we already run, with no material gain.
- ▢ It cannot meet a security or compliance requirement we already hold.

Step 2. Score each 0 to 3. 0 fails or unknown, 1 weak, 2 adequate, 3 strong.

#	Criterion	A 3 looks like	Weight	Score
1	Need and non-overlap	A real unmet job; nothing in the stack does it	×2	
2	Integration	Native, documented, two-way with our CRM and platform	×2	
3	Data control and portability	We know what it touches, where data sits, and can export it	×2	
4	Security posture	Current SOC 2 Type II or equivalent, documented	×1	
5	AI handling	No training on our data; output is inspectable (score 3 if no AI)	×1	
6	Adoption fit	The team will use it; low admin burden	×1	

#	Criterion	A 3 looks like	Weight	Score
7	Exit	We could remove it and get our data back without pain	×1	

Step 3. Total it, out of 30. The three doubled criteria are doubled on purpose. A tool that scores well everywhere else but fails on need, integration, or data control makes more work than it saves.

Step 4. Read it.

24 to 30: strong, proceed.

16 to 23: viable with real gaps you fix or accept knowingly.

Below 16: a demo talked you into it. Walk away.