

TECHNOLOGY VENDOR ASSESSMENT CHECKLIST

A practical framework for evaluating software, platforms, and AI-enabled technologies

1 DEFINE THE PROBLEM

- ☐ Clearly define the problem or opportunity.
- ☐ Identify who is affected by the problem.
- ☐ Identify constraints and assumptions.
- ☐ Consider whether AI is actually necessary to address the problem.
- ☐ Document the current-state process.
- ☐ Define the desired outcome.
- ☐ Document why an AI solution is being considered.

Notes: _____

2 IDENTIFY STAKEHOLDERS

- ☐ Identify executive/organizational leadership.
- ☐ Identify IT/information systems stakeholders.
- ☐ Identify patient/end-user representatives.
- ☐ Establish who has decision-making authority.
- ☐ Identify clinical and operational stakeholders.
- ☐ Identify privacy, security, compliance, or legal stakeholders.
- ☐ Define each stakeholder's role in the assessment.

Key question: Who will use it, support it, be affected by it, and be accountable for it?

3 DEFINE REQUIREMENTS

● MUST-HAVES

● NICE-TO-HAVES

- ☐ _____

☐ _____

☐ _____

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☐ _____
- ☐ _____

☐ _____

☐ _____

☐ _____

☐ _____

Organizational constraints

- ☐ Budget

☐ Staff capacity

☐ Implementation timeline
- ☐ Technical/infrastructure limitations

☐ Patient/user access considerations

☐ Regulatory, privacy, or security requirements

4 EVALUATE SOLUTIONS

Market review

- ☐ Identify potential vendors/solutions.

☐ Review independent information and references.

☐ Document relevant capabilities and limitations.
- ☐ Review vendor documentation.

☐ Identify comparable solutions.

☐ Ask Peer Organizations about similar solutions.

Ask every vendor

- ☐ Escalation and human handoff.

☐ Operational capacity.

☐ Patient/user experience.
- ☐ Technical requirements and integrations.

☐ Pricing and total cost.

☐ Implementation and support.

Questions vendors may not volunteer

- ☐ Governance and accountability.

☐ Integration limitations/workarounds.

☐ Support limitations and additional costs.
- ☐ Security incidents and response.

☐ AI functionality and transparency.

☐ Customer retention/sustainability.

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From assessment to decision—and beyond.

5 SCORE FINDINGS

- ☐ Establish evaluation criteria before scoring vendors.
- ☐ Score each vendor consistently.
- ☐ Remove vendors that don't meet Must-Have requirements
- ☐ Identify significant risks or unanswered questions.
- ☐ Assign weights based on organizational priorities.
- ☐ Document evidence supporting each score.
- ☐ Document vendor constraints.
- ☐ Compare results with organizational constraints.

Category	Weight	Vendor Score (4/4)	Weighted Score
_____	____%	____ / 4	_____
_____	____%	____ / 4	_____
_____	____%	____ / 4	_____
_____	____%	____ / 4	_____
_____	____%	____ / 4	_____
Total	100%		_____

Decision question: Which solution has the highest probability of success for our organization—not simply the highest score?

6 IMPLEMENT & MONITOR

- ☐ Confirm contract and scope.
- ☐ Establish implementation timeline.
- ☐ Configure solution and workflows.
- ☐ Establish AI guardrails and escalation procedures.
- ☐ Train affected staff.
- ☐ Document milestones/success criteria.
- ☐ Confirm implementation responsibilities.
- ☐ Identify organizational resources required.
- ☐ Establish security/privacy controls.
- ☐ Test critical workflows before go-live.
- ☐ Establish support and escalation pathways.
- ☐ Establish monitoring/reporting process.

Before go-live

- ☐ Critical workflows verified.
- ☐ Integration tested.
- ☐ AI behavior reviewed.
- ☐ Support process established.
- ☐ Human escalation tested.
- ☐ Security/privacy requirements verified.
- ☐ Staff prepared.
- ☐ Go-live criteria met.

7 POST-IMPLEMENTATION REVIEW

- ☐ Did the solution address the original problem?
- ☐ Are users/patients experiencing the expected benefits?
- ☐ Are there unexpected consequences?
- ☐ Are vendor performance and support meeting expectations?
- ☐ Have new risks emerged?
- ☐ Are the desired outcomes being achieved?
- ☐ Are staff workflows improved?
- ☐ Are AI errors or escalations occurring at an acceptable rate?
- ☐ Are costs consistent with expectations?
- ☐ Does the solution remain appropriate for the organization?

WHAT WORKED?	WHAT DIDN'T?	WHAT SHOULD WE CHANGE?
_____	_____	_____
_____	_____	_____