

Sales software evaluation scoresheet



Vendor Name:		Product Name:		
Features	Included?	Extra cost?	Rating (1-5)	Comments
Must-have feature #1	Yes	No		4 ask if it can let us do X
Must-have feature #2	Yes	No		5 exactly what we're looking for
Must-have feature #3	No	N/A		1
Nice-to-have feature #1	No	N/A		1
Nice-to-have feature #2	Yes	Yes		3 how much extra per user?
Score:				14

Pricing	Rating (1-5)	Information
Total cost		3 Overall will cost us \$XYZk a year
Up front cost		5 No up front cost
Recurring cost		3 Will take \$XX a month to account for all our users
Recurring cost frequency (monthly/quarterly/annually)		5 Monthly
Contract length		5 X years
Free trial duration		1 No free trial
Additional fees		3 Extra \$X a month if we go over our allowance
Score:		25

Tech support	Included?	Extra cost?	Rating (1-5)	Comments
Email	Yes	No		5
Call	Yes	Yes		3 not ideal to have to pay \$X per month to access this
Online chat	Yes	No		4
Online support request	No	N/A		1
Score:				13

The above are example categories - feel free to add as many as you think are relevant.
Copy this sheet and fill it out for each vendor's software you've explored.
Tally each vendor's score, then move onto the comparison sheet!