

Requirements before recommendations

Use one copy per finalist. This is a printable worksheet, not a vendor ranking.

Project / website: _____

Platform and exact plan: _____

Evaluator / date: _____

Main business job: _____

1. Pass the hard requirements

- ☐ Launch workflow and must-haves documented
- ☐ Required payment, booking or enquiry integration demonstrated
- ☐ Future operator can complete routine edits
- ☐ 24-month quote and renewal terms recorded
- ☐ Business controls domain, accounts and recovery
- ☐ Exit route understood and accepted

A failed must-have blocks selection. Unknown evidence is not a pass.

Requirement / evidence / owner / next action:

Compare fit and total cost

Weights are planning suggestions. Change them before scoring the finalists.

2. Score only demonstrated fit

Rate 1-5. Contribution = weight x rating / 5. Total is out of 100. Leave unknowns blank; an incomplete score cannot justify selection.

Criterion	Weight	Rating	Contribution
Workflow and local operations	30		
Team usability and maintenance	20		
SEO, accessibility and mobile	20		
24-month cost	15		
Integrations, ownership and exit	15		

Total (only when complete): / 100

3. Capture the complete 24-month cost

Record currency, tax treatment, billing term and renewal. Separate staff time from cash. Do not count hosting twice when included in the subscription.

Item	Year 1	Year 2	Evidence / quote
Setup and content			
Platform / hosting			
Domain and email			
Apps, licences and usage			
External maintenance			
Payment / transaction fees			
Applicable taxes			
Cash total			
Staff hours x cost/hour			
Economic total			
Migration contingency (separate)			

Test, document and decide

Run the same prototype on two finalists using synthetic data or a payment sandbox.

4. Test the real workflow

- ☐ Edit heading, image, navigation and a long page title
- ☐ Check mobile layout, keyboard access, labels and errors
- ☐ Confirm synthetic enquiry arrives in the CRM / inbox
- ☐ Test payment, order and refund workflow where relevant
- ☐ Demonstrate SEO controls, redirects and indexability
- ☐ Verify successful conversion events and duplicate prevention
- ☐ Demonstrate backup / recovery and inspect a sample export
- ☐ Confirm handover, support scope and cancellation terms

5. Record the exit plan

Check domain, content, media, design, forms, commerce, redirects and licences separately. Content export is not a complete working-site migration.

What exports? _____

What must be rebuilt? _____

Migration owner / estimated cost: _____

6. Decide with evidence

Decision: select / reject / investigate

Evidence supporting the decision:

Unresolved issues / next action:

Decision owner / approval date:

Recheck date before purchase:
