**Scorecard Instructions:**

To ensure your vendor search process is efficient and useful for all evaluators, it’s helpful to make notes throughout each demo in a scorecard such as this. It provides a place for evaluators to make notes and rate the vendor so at the end of the process, feedback is timely and accurate thereby assisting with the debrief process. It is recommended that each evaluator be provided with a scorecard for each vendor demo for them to make notes, provide a score and return to the project manager for final tally and debrief discussion.

|  |  |
| --- | --- |
| **Vendor Name:** |  |
| **Demo Date & Time:** |  |
| **Evaluator Name:** |  |
| **Project Goals:** | Project Manager to include 5-6 project goals |
| **Agenda** | \*Example only. Project Manager to update accordingly\*  9:00 – 9:30am Introductions & Vendor Overview  9:30 – 11:00am Technical Demo, Implementation & Support  11:00 – 11:30am Questions, Next Steps |
| **Questions?** | If you have any questions about this project or evaluator scorecard, please contact [Insert Customer Contact Name, Email and Phone]. |

**Vendor Attendees**

The following is a list of contacts from [Vendor Name] who will be presenting their wellness technology to you so you may address the appropriate resource for your questions.

|  |  |
| --- | --- |
| **Attendee Name** | **Attendee Job Title/Role** |
|  |  |
|  |  |
|  |  |

**Important Note to Evaluators:**

* We have asked vendors to present following the general demo flow noted below.
* To avoid being sidetracked, please hold your questions until the end of their presentation. The last page of this scorecard includes a place to track questions and answers.
* A rating scale and evaluator scorecard is on page 10 of this document. Please complete and return to [insert name of Project Manager].

**Evaluation Tips:**

* **End-User Experience** - the overall user experience is an essential requirement of any technology. If users find the platform difficult to navigate or aesthetically unappealing, this will impact overall engagement.
* **Site Admin Experience** – can site admin easily configure programs and update content? Are there easy to access reports? Are there advanced roles and permission options?
* **Functionality** – will the functionality help us address our project goals (see previous page) and/or help us solve the problems we currently have today? Will the functionality help us today and in the future as we grow and evolve? What (if any) limitations are there? Will our site administrator be able to make most changes to platform? Or will we need to contact the vendor?
* **Vendor** – what is your overall impression of this vendor? Are they professional, knowledgeable, and organized with processes in place? Are they someone you would want to work with? It is important to select a vendor that has a good product and great service including a willingness to accommodate special requests.

**Agenda & Demo Flow** (as provided to vendor)

* + - * Roundtable Introduction of Attendees (both customer and vendor)
      * Vendor Introduction & Background
      * Technology Demo
  + End-User Engagement
  + Site Administration
    - * Implementation
      * Support
      * Questions?

**Scorecard**

**Rating Scale:**

Include your notes below to help you remember the key points of each vendor.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **0** | **1** | **2** | **3** | **4** | **5** |
| Not Available or Applicable | Strongly Disliked | Somewhat Disliked | Neutral | Liked | Loved |

**Please rate the following using the scale above:**

| **Criteria** | **Notes** | **Rating** |
| --- | --- | --- |
| 1. **Vendor** | | |
| * Knowledgeable * Organized * Established Processes * Experienced * Proven successes * Similar customers * Established partnerships * Constantly innovating * Flexible and willing * No concerns or ‘red flags’ |  |  |
| 1. **End-User Experience** | | |
| * Easy to navigate/intuitive * Engaging home page * Includes fun elements (e.g. imagery, maps, etc.) * Easy program registration & participation * Provides a variety of communication options (e.g. email, text, social, notifications, etc.) * Easy to track activity * Relevant reports * I could see myself using this as an end-user. |  |  |

|  |  |  |
| --- | --- | --- |
| **Site Administration** | | |
| 1. **Tailoring & Branding**  * Can easily change logos, colors, style, widgets, and features, for some or all locations, etc. * Ability to tailor end-user experience. * Selection of website ‘skins’ available * Configuration options for programs (e.g. challenges, coaching, etc.) vs. custom coding |  |  |
| 1. **Incentives & Rewards**  * Incentive tracking options (e.g. points/badges, etc.) * Can be tailored * Variety of reward options (e.g. gift cards, donations, gear, etc.) |  |  |
| 1. **Content Management**  * Out-of-the-Box Content * Ability to create content * Ability to use third-party content * Flexible distribution options to deliver content relevant to each user. |  |  |

|  |  |  |
| --- | --- | --- |
| 1. **Biometrics**  * Bulk imports possible * Third-party integrations * Health score (including historical comparisons) * Health advice based on values |  |  |
| 1. **Lifestyle Assessment / HRA**  * Standardized validated and science-based assessment * Assessment creation (can site admin create or modify?) * Third-party integrations with HRA providers * Historical health data available |  |  |
| 1. **Challenges**  * Themed Challenges (e.g. physical activity, smoking, mental health, sleep, etc.) * Challenge creation and/or editing capabilities * Challenge options (team, group, individual) * Any limits or restrictions? |  |  |

|  |  |  |
| --- | --- | --- |
| 1. **Coaching**  * Adequate functionality * Ability for site admin to develop programs * Communication options (e.g. email, video, SMS, etc.) * Coach Assignment * Appointments * Coach Dashboard |  |  |
| 1. **Communications**  * Variety of methods (e.g. SMS, emails, notifications) * Ability to segment by department, location, country, language, etc. |  |  |
| 1. **Languages**  * Site translations * Content translations |  |  |
| 1. **Reporting**  * Standard, ready to use reports available * Custom fields can be reported * Reports can be segmented (e.g. dept., location, etc.) * Variety of export options * Can demonstrate ROI/VOI * Dashboards provided with graphical representations of data * Custom reports can be developed |  |  |
| 1. **Mobile Access**  * Native app is available via app stores * Does native app provide full functionality? Or limited functionality? * Responsive web design that is responsive (adjusts) for any device |  |  |
| 1. **Third-Party Integrations**  * Experienced integrating with third-party tools * Standard device integrations |  |  |
| 1. **Technical**  * Single Sign-On * Data Hosting (Client-Server or in Cloud) * Data Access – role-based permissions * Data History/Audit Trail * General Architecture * Unique URLs (Vanity URLs) * System Upgrades (e.g. frequency) * Security (HIPAA, Data encryption, Monitoring, Audits) |  |  |

|  |  |  |
| --- | --- | --- |
| 1. **Implementation**  * Established implementation process * Discussed required resources (both customer and vendor) * Discussed Timeline |  |  |
| 1. **Support**  * Adequate support hours * Adequate response times * Variety of methods to contact support * Any guarantees? |  |  |
| 1. **Managed Services**  * Program set-up maintenance and data analysis reporting completed by vendor’s in-house team (for eligible buyer groups) |  |  |
| **TOTAL VENDOR SCORE** | |  |

**Overall Total Vendor Score Assessment**

**Maximum possible score:** 18 questions x score of 5 each = 90 total score

* Score of 80-90 = Optimal Vendor
* Score of 70-79 = Possible Runner Up
* Score of <70 = Not worth your time

**Additional Notes / Questions & Answers**

Track any questions that arise during the webinar so you can ask at the end of the vendor presentation.