Vendor Match Worksheet

A practical worksheet for comparing HR-related vendors based on your business needs

Choosing an HR-related vendor is easier when every option is measured against the same needs. Use this worksheet to define what you need, ask each vendor the same questions, and document your decision.

How to use: Work through the four steps in order. Complete Step 1 before talking to vendors so every conversation starts from your needs.

Vendor type being considered _____

Business need / problem to solve _____

> **Please note:** This worksheet is designed to organize a comparison. It does not recommend or endorse a particular vendor. Your business should evaluate contract terms, security, service commitments, legal requirements, and professional advice as appropriate.

1 Define What You Need

Core function(s) the vendor must provide

Number of employees / users the solution must support

Required integrations or systems

Must-have reporting / administrative features

Implementation deadline or preferred timing

Budget parameters or approval process

2 Ask Every Vendor the Same Questions

Check each question once every vendor has answered it. Record answers in Step 3.

- [ ] What is included in the quoted service?
- [ ] What costs are one-time, recurring, or usage-based?
- [ ] How long does implementation typically take, and what does the client need to provide?
- [ ] What support channels and service hours are available?
- [ ] How are data security, access, backups, and privacy handled?
- [ ] Can data be exported if we leave the service? In what format?
- [ ] What integrations are available, and are there added fees?
- [ ] What contract term, renewal, cancellation, and notice requirements apply?
- [ ] Who owns setup, training, ongoing administration, and problem escalation?
- [ ] What references, demos, or documentation can the vendor provide?

3 Compare Your Options

Compare each option using the same factors.

COMPARISON FACTOR	VENDOR A	VENDOR B	VENDOR C
Vendor / product name			
Core needs met			
Implementation / setup			
Ease of administration			
Support model			
Integrations			
Data / security considerations			
Contract / cancellation			
Total cost considerations			
Questions / concerns			

4 Decide & Document

Option(s) that best match the documented business need

What still needs to be verified before signing?

Who will review the agreement, security, and implementation details?

Final decision and reason

Not sure which vendor fits your business?

ThriveWell HR Consulting, LLC can help you define your needs, organize a side-by-side comparison, and prepare the right questions before you commit.

Have a question? Visit **Ask ThriveWell** at thrivewellhrconsultingllc.com

Important: *This resource is provided for general educational and organizational purposes. It is not legal, tax, payroll-processing, benefits, or accounting advice. Requirements vary by employer, location, workforce, and situation. Confirm applicable requirements with the appropriate professional or government agency when needed.*