Vendor Evaluation Process

Complete User Guide

Healthcare IT Vendor Selection Framework

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Vendor Evaluation Process - User Guide# Vendor RFQ Evaluation Process - User Guide

Complete Step-by-Step Instructions for Healthcare IT Vendor Selection## Overview

This comprehensive Excel workbook provides a complete framework for evaluating and selecting vendors for mission-critical healthcare IT systems, specifically designed for HL7/ FHIR integration platforms.

File: `Vendor_RFQ_Evaluation_Process_Comprehensive.xlsx`

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The Excel file contains **11 worksheets** that guide you through the entire vendor evaluation lifecycle, including real-world examples:

Example Vendors Included:

Getting Started- Mirth Connect (Open Source / BUILD option) - Free platform with customization

- **InterSystems HealthShare** (Enterprise / BUY option) - Premium commercial solution

Prerequisites- Rhapsody Integration Engine (Mid-Market / BUY option) - Balanced commercial option

- Microsoft Excel 2016 or later (or compatible spreadsheet software)

- Basic understanding of your organization's integration requirements---

- Stakeholder team assembled (Clinical, IT, Security, Procurement)

1 Process Overview

Initial Setup- Purpose: High-level view of the 6-phase evaluation process

1. **Open the Excel file**: `Vendor_RFQ_Evaluation_Process_Comprehensive.xlsx` - **Contents:**

2. **Save a working copy**: Keep the original as a template - Complete process flow from RFQ receipt to contract signing

3. **Review all sheets**: Familiarize yourself with the 11 worksheets - Decision gates and branching logic

4. **Customize vendor names**: Replace example vendors with your actual candidates - Timeline estimates for each phase

5. Key deliverables

---- **How to Use:** Start here to understand the overall process. Reference this sheet throughout your evaluation to track progress.

Sheet-by-Sheet Instructions### 2 Compliance Checklist

- **Purpose:** Phase 1 - Initial screening of vendor responses

Sheet 1: Process Overview- Contents:

- Mandatory vs. optional requirements

Purpose: Understand the 6-phase evaluation framework - Submission requirements validation

- Documentation completeness check

What to Review: - Certifications verification (HIPAA, SOC 2, HITRUST)

- **Phase 1**: Initial Screening - Filter out non-viable vendors - Technical requirements confirmation

- **Phase 2**: Detailed Evaluation - Score against weighted criteria - Automated PASS/FAIL calculation

- **Phase 3**: Vendor Demonstrations - Assess real-world capabilities- **How to Use:**

- **Phase 4**: Reference Checks - Validate vendor claims 1. Enter "Yes", "No", or "N/A" for each vendor in columns D, E, F

- **Phase 5**: BAFO & Negotiation - Finalize commercial terms 2. Add notes in column G about discrepancies

- **Phase 6**: Final Recommendation - Make the selection 3. Review the automatic PASS/FAIL decision at the bottom

- Only proceed with vendors who PASS

Action Items:

1. Review timeline estimates (typically 8-12 weeks total)### 3 **Evaluation Matrix**

2. Identify your project stakeholders for each phase- **Purpose:** Phase 2 - Detailed weighted scoring across 5 categories

3. Note the decision gates (GO/NO-GO checkpoints)- **Contents:**

4. Plan your evaluation schedule - **Functional Requirements (35%)**: HL7 v2, FHIR R4, transformations, error handling

5. **Technical Capabilities (30%)**: Architecture, performance, APIs, DevOps support

Decision Gates: - **Security & Compliance (20%)**: Encryption, audit logs, certifications, privacy controls

- After Phase 1: Proceed only with 3-5 qualified vendors - **Vendor Viability (10%)**: Financial stability, market presence, support quality

- After Phase 2: Shortlist to 2-3 vendors for demos - **Commercial Terms (5%)**: Pricing model, TCO, contract flexibility

- After Phase 4: Select 1-2 vendors for BAFO - Automated weighted score calculation

- Automatic ranking and recommendation

---- **How to Use:**

1. Enter vendor names in cells B3, D3, F3

Sheet 2: Compliance Checklist 2. Score each criterion in the "V1/V2/V3 Score" columns (use max score as reference)

1. Weighted scores calculate automatically

Purpose: Verify mandatory requirements before detailed evaluation 4. Review category subtotals and total weighted score

1. The system will identify the top choice with

How to Use:

1. **List Requirements** (Column B): Already populated with 24 standard items### 4 **Demo Evaluation**

2. **Add Custom Requirements**: Insert rows for organization-specific needs- **Purpose:** Phase 4 - Assess live technical demonstrations

3. **Vendor Response** (Columns D, F, H):- **Contents:**

4. Enter "Yes" if vendor meets the requirement - Demo scenarios: HL7 processing, FHIR operations, transformations, error handling

5. Enter "No" if they don't - Performance and monitoring assessment

6. Enter "Partial" with explanation if partially met - Red flags checklist (critical issues to watch for)

7. **Overall Result** (Row 27): Manually enter "PASS" or "FAIL" - Overall pass/fail recommendation

8. **How to Use:**

Scoring Rules: 1. Schedule 2-3 hour demos with each vendor

- ⚠ **ANY "No" = FAIL** - This is a strict compliance check 2. Request they use YOUR actual (anonymized) data

- All mandatory items must be "Yes" or acceptable "Partial" 3. Score each scenario on a 1-5 scale

- Document any "Partial" responses with details 4. Document observations in the Notes columns

- Check any observed red flags

Example Requirements: 6. Use this to validate vendor claims from their proposals

- HIPAA Compliance Certification

- SOC 2 Type II Audit Report### 5 **Reference Checks**

- HL7 v2.x Support (minimum v2.3)- **Purpose:** Phase 4 - Validate vendor claims through customer interviews

- FHIR R4 Compatibility- **Contents:**

- 24/7 Production Support - Structured interview template

- Key questions across: Implementation, Performance, Support, Cost, Relationship

Pro Tips: - Red flags section

- Request proof documentation for each "Yes" - Overall reference rating

- Use vendor questionnaires to gather this data- **How to Use:**

- Reject vendors early if they fail compliance 1. Contact at least 3 customers per vendor

- Add industry-specific requirements (HITRUST, PCI-DSS, etc.) 2. Mix vendor-provided references with independently sourced ones

- Ask probing questions about what went wrong (not just success stories)

--- 4. Document verbatim responses

1. Rate each reference interaction

Sheet 3: Evaluation Matrix - WEIGHTED SCORING 6. Look for patterns across multiple references

Purpose: Score vendors against 52 detailed criteria across 5 categories### 6 **BAFO Template**

- **Purpose:** Phase 5 - Request improved offers when top vendors are too close

Understanding the Scoring System:- **Contents:**

- Professional request letter template

Category Weights: - Checklist of areas for improvement:

| Category | Weight | Max Points | - Pricing & commercial terms

|----------|--------|------------| - Additional value-adds

| Functional Requirements | 35% | 35 points | - Improved SLAs

| Technical Capabilities | 30% | 30 points | - Implementation timeline

| Security & Compliance | 20% | 20 points | - Contract flexibility

| Vendor Viability | 10% | 10 points |- **How to Use:**

| Commercial Terms | 5% | 5 points | 1. Use this when 2-3 vendors are within 5-10 points of each other

| **TOTAL** | **100%** | **100 points** | 2. Customize the letter with your specific requirements

1. Send to shortlisted vendors simultaneously

Scoring Scales: 4. Set a clear deadline (typically 1-2 weeks)

- **Functional Requirements**: 1-10 scale (1=Poor, 10=Excellent) 5. Re-score vendors with new information

- **Technical Capabilities**: 1-5 scale (1=Weak, 5=Strong) 6. Return to the Evaluation Matrix to update scores

- **Security & Compliance**: 1-5 scale (1=Inadequate, 5=Best-in-class)

- **Vendor Viability**: 1-3 scale (1=Concern, 3=Excellent)### 7 **Final Recommendation**

- **Commercial Terms**: 1-4 scale (1=Poor, 4=Excellent)- **Purpose:** Phase 5-6 - Executive decision package

- **Contents:**

How to Score: - Executive summary with key strengths and risks

- Evaluation summary statistics

- **Enter Raw Scores** in columns D, F, H (for each vendor) - Side-by-side scoring comparison

- **Weighted Points Calculate Automatically** in columns E, G, I - 5-year financial analysis and TCO

- **Subtotals Sum Automatically** at the end of each category - Implementation plan with timeline

- **Grand Total Calculates** automatically (row 50) - Risk assessment and mitigation strategies

- Success criteria and KPIs

Scoring Guidelines by Category: - Approval signature block

- **How to Use:**

1 Functional Requirements (35% - Score 1-10) 1. Complete this after final scoring

Focus on **what the system can do**: 2. Tailor the narrative to your organization's priorities

- **HL7 v2 Message Support** (6%): 3. Include specific dollar amounts and dates

- 10 = All message types, full parsing 4. Present to stakeholders before executive approval

- 7-9 = Most common messages 5. Use as basis for contract negotiation

- 4-6 = Basic support only 6. Obtain required signatures

- 1-3 = Limited or custom development needed

8 Lessons Learned

- **FHIR R4 Implementation** (6%):- **Purpose:** Post-selection reflection and continuous improvement

- 10 = Complete FHIR R4, all resources- **Contents:**

- 7-9 = Core resources, some extensions - Common pitfalls and how to avoid them

- 4-6 = Basic FHIR support - What went well in your evaluation

- 1-3 = Roadmap item only - What could be improved

- Key takeaways

- **Message Transformation & Mapping** (5%): - Recommended timeline for future evaluations

- 10 = Visual mapper, templates, AI-assist- **How to Use:**

- 7-9 = GUI mapper with library 1. Complete this AFTER vendor selection

- 4-6 = Code-based mapping 2. Conduct a retrospective with your evaluation team

- 1-3 = Manual scripting only 3. Document both successes and challenges

- Use these insights for your next evaluation

- **Data Validation & Quality** (5%): 5. Share with other teams in your organization

- 10 = Real-time validation, data quality rules engine

- 7-9 = Schema validation, basic checks### 9 **Build vs Buy vs Rent**

- 4-6 = Manual validation rules- **Purpose:** Strategic decision framework for acquisition approach

- 1-3 = Minimal validation- **Contents:**

- Comprehensive comparison across BUILD (Mirth), BUY (InterSystems), RENT (SaaS) options

- **Error Handling & Recovery** (5%): - Initial investment analysis

- 10 = Automatic retry, alerting, dead-letter queues - 5-year total cost of ownership (TCO)

- 7-9 = Retry logic, manual recovery - Capability and flexibility comparison

- 4-6 = Basic error logging - Risk and support considerations

- 1-3 = Errors require manual intervention - Scalability assessment

- Decision matrix by organization type

- **Routing & Orchestration** (5%): - Scenario-based recommendations

- 10 = Visual workflow designer, complex routing- **How to Use:**

- 7-9 = Rule-based routing 1. Review before starting vendor evaluation

- 4-6 = Simple routing tables 2. Assess your organization's profile (size, budget, IT capability)

- 1-3 = Point-to-point only 3. Evaluate risk tolerance and customization needs

- Calculate TCO for your specific context

- **Pre-built Connectors** (3%): 5. Use the decision matrix to guide BUILD vs BUY vs RENT choice

- 10 = 50+ healthcare system connectors- **Sample Data:**

- 7-9 = 20-50 connectors - BUILD (Mirth): $2.74M over 5 years, high flexibility, high risk

- 4-6 = 10-20 connectors - BUY (InterSystems): $2.5M over 5 years, medium flexibility, medium risk

- 1-3 = Few or custom development needed - RENT (Cloud SaaS): $1.8M over 5 years, low flexibility, low risk

2   Technical Capabilities (30% - Score 1-5)###   Complexity Analysis

Focus on **how well it's built**:- **Purpose:** Quantitative assessment of implementation complexity by vendor

- **System Architecture** (5%):- **Contents:**

- 5 = Modern, cloud-native, microservices - Technical complexity scoring (installation, learning curve, custom code)

- 4 = Hybrid, containers supported - Integration complexity (systems, data formats, volumes)

- 3 = Monolithic but scalable - Organizational complexity (skills, change management, training)

- 2 = Legacy architecture - Operational complexity (maintenance, support, upgrades)

- 1 = Outdated, difficult to scale - Compliance complexity (security, auditing, certifications)

- Total complexity score (out of 125 points)

- **Performance & Throughput** (5%): - Risk ratings and mitigation strategies

- 5 = >100K messages/day proven - Color-coded risk levels (red=high, yellow=medium, green=low)

- 4 = 50K-100K messages/day- **How to Use:**

- 3 = 10K-50K messages/day 1. Review complexity scores for each vendor option

- 2 = <10K messages/day 2. Assess your team's capability against complexity requirements

- 1 = Performance concerns 3. High complexity (>72%): Requires expert team and governance

- Medium complexity (40-72%): Standard implementation with training

- **API Management** (4%): 5. Low complexity (<40%): Straightforward deployment

- 5 = Full API gateway, rate limiting, versioning 6. Use mitigation strategies to address high-complexity areas

- 4 = RESTful APIs with basic management- **Sample Results:**

- 3 = APIs available, limited management - Mirth Connect: 86% complexity (HIGH RISK) - requires expert developers

- 2 = Limited API support - InterSystems: 50% complexity (MODERATE) - adequate with vendor support

- 1 = No API layer - Rhapsody: 48% complexity (MODERATE) - balanced approach

- **Integration Patterns** (4%):### 1 1 **SWOT Analysis**

- 5 = All patterns (Pub/Sub, Request/Reply, Batch, Streaming)- **Purpose:** Strategic assessment of strengths, weaknesses, opportunities, and threats for each vendor

- 4 = Most patterns supported- **Contents:**

- 3 = Common patterns only - Individual SWOT matrices for all three vendor options

- 2 = Limited patterns - Color-coded quadrants (green=strengths, red=weaknesses, yellow=opportunities, gray=threats)

- 1 = Basic point-to-point - "Best For" and "Not Suitable For" summaries

- Key success factors and deal breakers

- **Monitoring & Observability** (4%): - Comparative SWOT summary table

- 5 = Real-time dashboards, alerts, APM integration - Strategic fit recommendations

- 4 = Good monitoring, basic dashboards- **How to Use:**

- 3 = Log files and basic metrics 1. Review each vendor's SWOT matrix

- 2 = Limited visibility 2. Identify which strengths align with your priorities

- 1 = Minimal monitoring 3. Assess whether weaknesses are acceptable trade-offs

- Evaluate opportunities for future growth

- **DevOps & CI/CD Support** (3%): 5. Determine if threats are manageable risks

- 5 = Full GitOps, containerized, infrastructure-as-code 6. Match vendor characteristics to your organizational profile

- 4 = Good CI/CD support- **Key Insights:**

- 3 = Basic automation possible - **Mirth Connect:** Best for tech-savvy teams with budget constraints, but high operational risk

- 2 = Limited automation - **InterSystems:** Best for large enterprises needing vendor support, but high cost and vendor lock-in

- 1 = Manual deployment only - **Rhapsody:** Best for mid-market seeking balance, but smaller ecosystem and market presence

- **Data Storage Options** (3%):---

- 5 = Multiple options (SQL, NoSQL, object storage)

- 4 = Good database support## Quick Start Guide

- 3 = Standard database

- 2 = Limited storage options### For First-Time Users:

- 1 = Proprietary storage only1. **Read Sheet 1 (Process Overview)** to understand the end-to-end flow

- **Review Sheet 9 (Build vs Buy vs Rent)** to decide your acquisition strategy

- **Standards Compliance** (2%):3. **Start with Sheet 2 (Compliance Checklist)** to eliminate non-compliant vendors

- 5 = All major standards (HL7, FHIR, DICOM, X12)4. **Move to Sheet 3 (Evaluation Matrix)** for detailed scoring (with sample data)

- 4 = Most healthcare standards5. **Check Sheet 10 (Complexity Analysis)** to understand implementation risks

- 3 = Core standards only6. **Review Sheet 11 (SWOT Analysis)** for strategic assessment

- 2 = Limited standards7. **Use Sheets 4-5** during the validation phase

- 1 = Proprietary protocols8. **Apply Sheet 6 (BAFO)** only if needed

- **Complete Sheet 7** for executive presentation

3 Security & Compliance (20% - Score 1-5)10. **Fill Sheet 8** after selection for future reference

Focus on **data protection and regulations**:

- **Authentication & Authorization** (3%):### For Experienced Users:

- 5 = Enterprise SSO, RBAC, MFA, SAML/OAuth- Jump directly to the sheet relevant to your current phase

- 4 = Good access controls- Use the Process Overview sheet as a checklist

- 3 = Basic authentication- Customize scoring weights in the Evaluation Matrix to fit your priorities

- 2 = Limited security- Leverage the sample vendor data as templates for your own evaluation

- 1 = Weak authentication

Understanding the Sample Data:

- **Encryption & Data Protection** (3%):The workbook includes realistic scores for three vendor types:

- 5 = TLS 1.3, at-rest encryption, HSM support- **Mirth Connect (BUILD):** Low cost, high complexity, maximum flexibility

- 4 = Strong encryption- **InterSystems (BUY):** High cost, medium complexity, enterprise features

- 3 = Basic encryption- **Rhapsody (BUY):** Medium cost, medium complexity, user-friendly

- 2 = Partial encryption

- 1 = Weak encryptionUse these as benchmarks when scoring your actual vendors.

- **Audit & Compliance Logging** (3%):---

- 5 = Comprehensive audit trails, immutable logs

- 4 = Good logging## � Understanding the Sample Vendors

- 3 = Basic audit logs

- 2 = Limited loggingThe workbook includes three realistic vendor examples representing different acquisition strategies:

- 1 = Minimal audit trail

1. Mirth Connect (BUILD Option)

- **Regulatory Certifications** (3%):**Profile:** Open-source integration engine

- 5 = HITRUST, SOC 2, ISO 27001, FedRAMP- **Cost:** Free license, but high operational costs ($2.74M over 5 years)

- 4 = SOC 2 + one other- **Strengths:** Zero licensing fees, full customization, no vendor lock-in

- 3 = SOC 2 only- **Weaknesses:** Requires strong development team, no formal support, compliance burden

- 2 = In progress- **Best For:** Tech-forward organizations with strong Java/JavaScript skills and tight budgets

- 1 = None- **Complexity Score:** 86% (HIGH RISK)

- **Evaluation Score:** 70.5/100 (Acceptable)

- **Vulnerability Management** (2%):

- 5 = Continuous scanning, bug bounty, rapid patching### 2. InterSystems HealthShare (BUY Option - Enterprise)

- 4 = Regular scanning and patching**Profile:** Premium enterprise integration platform

- 3 = Basic vulnerability management- **Cost:** High upfront investment ($2.5M over 5 years)

- 2 = Reactive only- **Strengths:** 40+ years in healthcare, excellent FHIR support, 24/7 support, all certifications

- 1 = Limited process- **Weaknesses:** Expensive, steep learning curve, vendor lock-in, requires Caché/ObjectScript

- **Best For:** Large health systems, high message volumes, complex enterprise integrations

- **Consent Management** (2%):- **Complexity Score:** 50% (MODERATE)

- 5 = Built-in consent framework (FHIR Consent)- **Evaluation Score:** 85.5/100 (Good)   **TOP CHOICE**

- 4 = Good consent support

- 3 = Basic consent handling### 3. Rhapsody Integration Engine (BUY Option - Mid-Market)

- 2 = Limited support**Profile:** User-friendly commercial integration engine

- 1 = Manual process- **Cost:** Moderate pricing ($1.8M over 5 years)

- **Strengths:** Easy to use, good documentation, faster implementation, responsive support

- **Data Privacy Controls** (2%):- **Weaknesses:** Smaller market share, fewer pre-built connectors, less enterprise features

- 5 = GDPR-ready, data residency, right-to-delete- **Best For:** Medium-sized hospitals prioritizing ease of use and reasonable cost

- 4 = Good privacy controls- **Complexity Score:** 48% (MODERATE)

- 3 = Basic privacy features- **Evaluation Score:** 81.5/100 (Good)

- 2 = Limited controls

- 1 = Minimal privacy features### Key Trade-offs Illustrated:

- **Network Security** (2%):| Factor | Mirth (BUILD) | InterSystems (BUY) | Rhapsody (BUY) |

- 5 = VPN, firewall rules, network segmentation, DDoS protection|--------|---------------|------------------|---------------|

- 4 = Good network security| **Initial Cost** | Low | Very High | Medium |

- 3 = Basic security| **5-Year TCO** | $2.74M | $2.5M | $1.8M |

- 2 = Limited controls| **Complexity** | Very High | Medium | Medium |

- 1 = Weak network security| **Flexibility** | Maximum | Moderate | Moderate |

| **Risk** | High | Medium | Medium |

4 Vendor Viability (10% - Score 1-3)| **Support** | **Community** | **Enterprise** | **Enterprise** |

Focus on **vendor stability and support**:| **Time to Value** | 6-9 months | 4-6 months | 3-4 months |

- **Financial Stability** (2%):

- 3 = Profitable, strong financials, established company### Strategic Insights:

- 2 = Break-even or venture-backed- **Lowest TCO ≠ Best Choice:** Rhapsody has lowest TCO but InterSystems scored highest

- 1 = Financial concerns or unknown- **Hidden Costs:** Mirth's "free" license becomes expensive with staffing ($400K/year)

- **Complexity Tax:** High complexity (Mirth) requires expert team or expensive consultants

- **Market Presence & Track Record** (2%):- **Vendor Lock-in:** InterSystems has highest score but creates dependency

- 3 = 10+ years, 100+ customers- **Sweet Spot:** Rhapsody balances cost, features, and ease of use for mid-market

- 2 = 5-10 years, 50+ customers

- 1 = New or small customer base---

- **Healthcare Experience** (2%):## �   Scoring Guidance

- 3 = Specialized in healthcare, deep expertise

- 2 = Healthcare is one focus area### Evaluation Matrix Scoring Scale:

- 1 = Limited healthcare experience- **10/10 or 5/5:** Exceptional - Exceeds all requirements, industry-leading

- **8-9 or 4:** Strong - Meets all requirements with some nice-to-haves

- **Support & SLA Guarantees** (2%):- **6-7 or 3:** Adequate - Meets minimum requirements, nothing special

- 3 = 24/7/365 support, 99.9% uptime SLA- **4-5 or 2:** Weak - Gaps in functionality, workarounds needed

- 2 = Business hours support, standard SLA- **0-3 or 1:** Poor - Does not meet requirements, critical gaps

- 1 = Community support or limited SLA

Interpretation of Total Weighted Scores:

- **Training & Documentation** (1%):- **90-100:** Excellent - Highly Recommended (minimal risk)

- 3 = Comprehensive training program, excellent docs- **80-89:** Good - Recommended (acceptable risk)

- 2 = Good documentation, basic training- **70-79:** Acceptable - Gaps to Address (moderate risk)

- 1 = Limited documentation- **60-69:** Marginal - High Risk (proceed with caution)

- **Below 60:** Not Recommended (reject)

- **Implementation Services** (1%):

- 3 = Full professional services, certified partners---

- 2 = Some implementation support

- 1 = DIY or limited services##   Best Practices

5 Commercial Terms (5% - Score 1-4)### Do's:

Focus on **pricing and contract terms**:   Involve technical staff who will use the system daily

- **Pricing Model Transparency** (1.5%):   Require live demos with your actual data/scenarios

- 4 = Clear, simple pricing   Check references beyond vendor-provided contacts

- 3 = Understandable with effort   Calculate 5-year TCO, not just upfront costs

- 2 = Complex pricing model   Negotiate SLAs, exit clauses, and IP rights upfront

- 1 = Opaque or confusing   Add 20-30% buffer to vendor timeline estimates

Document everything for audit trail and future reference

- **Total Cost of Ownership (5yr)** (1.5%):

- 4 = Very competitive TCO### Don'ts:

- 3 = Market-average TCO× Skip the compliance check phase

- 2 = Above-average TCO× Accept PowerPoint demos instead of live systems

- 1 = Very expensive× Rush the evaluation to meet arbitrary deadlines

× Ignore hidden costs (training, implementation, upgrades)

- **Contract Flexibility** (1%):× Make decisions based on sales relationships alone

- 4 = Flexible terms, easy exit× Underestimate change management and training needs

- 3 = Standard terms× Proceed without clear success criteria

- 2 = Rigid terms

- 1 = Vendor lock-in concerns---

- **Value for Money** (1%):##   Key Decision Gates

- 4 = Exceptional value

- 3 = Good valueThroughout the process, you'll encounter critical decision points:

- 2 = Fair value

- 1 = Poor value1. **After Compliance Check:** PASS or REJECT each vendor

- **After Detailed Evaluation:** Shortlist 3-5 vendors (or reject all and restart)

Interpreting Results:3. **After Demos & References:** Clear winner or need BAFO?

| Score Range | Rating | Interpretation |4. **After BAFO:** Final selection

|------------|-------|---------------|5. **Executive Approval:** Proceed to contract or re-evaluate?

| 90-100 | Excellent | Top choice, minimal concerns |

| 80-89 | Good | Strong candidate, minor gaps |---

| 70-79 | Acceptable | Viable option with some concerns |

| 60-69 | Marginal | Significant gaps, proceed with caution |## Expected Timeline

| <60 | Not Recommended | Too many concerns, likely reject |

| Phase | Duration | Can Overlap? |

Pro Tips:|-------|----------|--------------|

- Score based on **demonstrated capability**, not roadmap promises| Initial Compliance Check | 1 week | No |

- Use multiple evaluators and average scores to reduce bias| Detailed Evaluation | 2-3 weeks | No |

- Document reasoning for all scores (use Notes column)| Shortlisting | 1 week | No |

- Request proof/demos for high-impact criteria| Demos & Clarifications | 2-3 weeks | Partially |

- Compare against current state baseline if replacing existing system| Reference Checks | 1 week | Yes (with demos) |

| Site Visits (optional) | 1-2 weeks | Yes |

---| Final Scoring | 1 week | No |

| Recommendation & Approval | 2-3 weeks | No |

Sheet 4: Demo Evaluation| Contract Negotiation | 4-8 weeks | No |

| **TOTAL** | **3-5 months** | |

Purpose: Assess vendor performance during live demonstrations

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Preparation (1 week before demo):

1. **Create Demo Script**: Define 5-10 key scenarios## Training & Support

2. **Share with Vendors**: Send script 3-5 days ahead

3. **Assemble Team**: 5-8 stakeholders (clinical, IT, security)### For Evaluation Team Members:

4. **Prepare Questions**: Technical deep-dives ready- Review the Process Overview sheet together as a team

5. Assign roles: Functional lead, Technical lead, Security lead, Commercial lead

Demo Day Checklist:- Schedule regular sync meetings (weekly during evaluation)

- Allocate 2-3 hours per vendor- Use a shared drive to store vendor proposals and this Excel file

- Assign note-takers

- Record session (with permission)### For Executives:

- Score immediately after (while fresh)- Focus on Sheet 7 (Final Recommendation)

- Review the executive summary and scoring comparison

How to Score Each Scenario:- Ask about risk mitigation strategies

1. **Scenario Column**: Pre-populate with your use cases- Validate financial analysis and ROI projections

2. **Score (1-10)**: Rate how well vendor demonstrated the scenario

3. 10 = Flawless, exactly what we need---

4. 7-9 = Very good, minor concerns

5. 4-6 = Adequate, some gaps## Customization Tips

6. 1-3 = Poor, major concerns or couldn't demonstrate

7. **Notes**: Document what worked, what didn'tYou can adapt this framework to your specific needs:

8. **Weight**: Assign importance (1-5) to each scenario

9. **Adjust Weights:** In Sheet 3, modify the weight percentages to reflect your priorities

Example Scenarios: - Example: Increase Security from 20% to 30% for highly regulated environments

1. **HL7 ADT Message Processing** (Weight: 5)

2. Inbound ADT^A01, validate, transform, route to 3 systems2. **Add/Remove Criteria:** Insert or delete rows in the Evaluation Matrix

3. **FHIR API Integration** (Weight: 4) - Remember to adjust formulas if you add/remove rows

4. Query patient data via FHIR API, display in UI

5. **Error Handling** (Weight: 5)3. **Change Scoring Scale:** Modify the Max Score column to use a different scale

6. Simulate failed connection, show retry logic and alerting - Example: Change from 1-10 to 1-100 scale

7. **Data Transformation** (Weight: 4)

8. Map complex ORU to internal format using GUI tool4. **Add Vendors:** Insert additional columns in sheets 2-5 for more than 3 vendors

9. **Performance Under Load** (Weight: 3) - Copy formulas from existing vendor columns

10. Process 1000 messages, show throughput metrics

11. **Localization:** Translate section headers and criteria to your language

Red Flags to Watch For:

- Vendor can't demonstrate core requirements---

- Excessive "this is on our roadmap"

- Demo environment crashes or has issues## Data Security & Compliance

- Evasive answers to technical questions

- Pre-recorded demos instead of live- **Confidentiality:** This file contains sensitive vendor and pricing data

- **Access Control:** Limit access to evaluation team members only

Scoring Formula:- **Version Control:** Save dated versions after major updates

\`\`\`- **Audit Trail:** Document all scoring rationale in the Notes columns

Weighted Score = Σ(Scenario Score × Weight) / Σ(Weights)- **Retention:** Keep completed evaluations for 3-7 years per your policy

\`\`\`

Common Questions

Sheet 5: Reference Checks

Q: What if we have more than 3 vendors?

Purpose: Validate vendor claims with existing customersA: Add additional columns in the Compliance Checklist and Evaluation Matrix. Copy formulas from existing columns.

How to Conduct Reference Calls:**Q: Can we skip the compliance check?**

A: Not recommended. It saves time by eliminating unqualified vendors early.

Before the Call:

1. Request 3-5 references from vendor (prefer similar size/use case)**Q: Do we need to do site visits?**

2. Schedule 30-45 minute callsA: Only for mission-critical systems or large investments ($1M+). Otherwise, demos and references are sufficient.

3. Prepare question list (Column B)

4. Assign interviewer roles**Q: How do we handle tie scores?**

A: Use the BAFO process (Sheet 6) to request improved offers, or conduct deeper reference checks.

During the Call:

1. Explain your evaluation project**Q: What if no vendor scores above 70?**

2. Ask open-ended questions firstA: Consider restarting the RFQ process with revised requirements or exploring alternative solutions.

3. Use provided questions as guide

4. Listen for unprompted concerns**Q: How often should we update the evaluation criteria?**

5. Take detailed notesA: Annually, or when major technology/regulatory changes occur.

Reference Question Categories:---

1. Implementation Experience (Questions 1-5):##   Related Artifacts

- Timeline vs. estimate

- Challenges encounteredThis Excel workbook complements:

- Vendor support quality- `Vendor RFQ Evaluation Checklist - Scoring Framework.pdf` - Detailed methodology

- Post-go-live issues- `Vendor-Comparison-Matrix-Analysis-Framework-Interactive-artifact.html` - Web-based scoring tool

- Would you do it again?- Your organization's procurement policies and procedures

2. Product Performance (Questions 6-10):---

- System reliability/uptime

- Performance under load## ✏ Version History

- Integration capabilities

- Feature completeness| Version | Date | Changes |

- Hidden limitations|---------|------|---------|

| 1.0 | 2025-11-30 | Initial release with 8 worksheets |

3. Support & Maintenance (Questions 11-15):| 2.0 | 2025-11-30 | Added 3 new sheets: Build vs Buy vs Rent, Complexity Analysis, SWOT Analysis. Included 3 sample vendors with realistic scoring data |

- Support responsiveness

- Quality of technical support---

- Documentation adequacy

- Upgrade experience##   Document Owner

- Ongoing costs

Prepared by: Solution Architect / IT Procurement Team

4. Overall Satisfaction (Questions 16-20):**Approved by:** CIO / IT Leadership

- Would you recommend?**Review Cycle:** Annual or per major RFQ

- What do you wish you knew?

- Best features---

- Worst features

- Alternatives considered##   Feedback & Improvements

Scoring Each Reference:If you have suggestions for improving this framework, please document them in Sheet 8 (Lessons Learned) and share with your procurement/IT leadership team.

- **Green (5)**: Enthusiastic recommendation, no major concerns

- **Yellow (3)**: Mixed review, some concerns but overall positive---

- **Red (1)**: Negative experience, significant concerns

Remember: This is a framework, not a rigid checklist. Adapt it to your organization's size, risk tolerance, and specific requirements. The goal is a defensible, well-documented decision that balances technical fit, risk, cost, and organizational needs.

Calculate Average: Automatically sums all reference scores

Good luck with your vendor evaluation!

Red Flags: -   Reference is evasive or rushed -   Multiple negative experiences -   "We're planning to replace it" comments -   Vendor can't provide relevant references -   All references are very recent (no long-term users)

Pro Tips: - Ask for references NOT provided by vendor (LinkedIn, user groups) - Speak to technical staff, not just managers - Request follow-up calls if needed - Check online reviews (Gartner, G2, KLAS)

Sheet 6: BAFO Template

Purpose: Request Best and Final Offer from top 1-2 vendors

When to Use: After completing Phase 4, you should have 1-2 finalists. Use BAFO to: - Negotiate better pricing - Clarify any remaining questions - Get final commitment on terms

BAFO Components:

Section 1: Pricing Request - Base license/subscription costs - Implementation services breakdown - Ongoing support costs - Training costs - Year-over-year escalation rates

Section 2: Technical Clarifications - Specific feature confirmations - Integration approach details - Security/compliance specifics - Performance guarantees

Section 3: Commercial Terms - Payment terms - Contract length options - Termination clauses - IP/Data ownership - SLA specifics

Section 4: Implementation Plan - Detailed timeline - Resource requirements (vendor + customer) - Milestone deliverables - Acceptance criteria

How to Fill Out: 1. **Vendor Response Columns**: Forward to each vendor 2. **Due Date**: Typically 1-2 weeks 3. **Evaluation Notes**: Compare responses side-by-side 4. **Negotiation Points**: Highlight areas for discussion

BAFO Meeting: - Schedule 2-hour session with each vendor - Bring procurement and legal teams - Review BAFO in detail - Negotiate key terms - Document commitments

Pro Tips: - Use BAFO leverage for better pricing (10-20% reductions common) - Get everything in writing - Don't show vendor A's pricing to vendor B (unethical) - Include "this is our final evaluation" disclaimer - Set hard deadline for responses

---

Sheet 7: Final Recommendation

Purpose: Document selection decision and present to leadership

How to Complete:

1. Executive Summary (1 paragraph): - State recommendation clearly - Summarize selection process - Note key differentiators

2. Vendor Overview Table: Fill in for all evaluated vendors: - Final weighted scores - Strengths (top 3) - Weaknesses (top 3) - Total Cost of Ownership (5 years) - Contract terms summary

3. Detailed Analysis:

Recommended Vendor Section: - Why they won - Specific strengths aligning with requirements - Implementation approach - Risk mitigation plans

Runners-Up: - Why not selected - What they did well - Where they fell short

4. Implementation Roadmap: - Phase 1: Contract & Kickoff (Weeks 1-4) - Phase 2: Design & Configuration (Weeks 5-12) - Phase 3: Development & Testing (Weeks 13-20) - Phase 4: Training & UAT (Weeks 21-24) - Phase 5: Go-Live & Hypercare (Weeks 25-28) - Phase 6: Optimization (Months 7-12)

5. Financial Summary:

Cost Category	Year 1	Years 2-5	Total (5yr)
License/Subscription	$XXX	$XXX	$XXX
Implementation	$XXX	$0	$XXX
Support & Maintenance	$XXX	$XXX	$XXX
Training	$XXX	$XXX	$XXX
TOTAL	**$XXX**	**$XXX**	**$XXX**

6. Risk Assessment:

Risk	Likelihood	Impact	Mitigation
Implementation delays	Medium	High	Phased approach, buffer time
Integration challenges	Low	Medium	POC completed, expert resources
Budget overruns	Low	High	Fixed-price contract, contingency
Vendor viability	Low	High	Financially stable vendor selected

7. Success Criteria (define how you'll measure success): - System uptime ≥99.9% - Message throughput >50K/day - Go-live within 6 months - User satisfaction >80% - ROI achieved within 18 months

8. Approval Sign-offs: - [ ] IT Leadership - [ ] Clinical Leadership - [ ] Security Officer - [ ] CFO/Finance - [ ] CIO/Executive Sponsor

Presentation Tips: - Create PowerPoint summary (10-15 slides) - Lead with recommendation, then supporting data - Anticipate objections - Bring demo recordings if helpful - Have detailed backup slides ready

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Sheet 8: Lessons Learned

Purpose: Capture insights for future vendor selections

When to Complete: - Immediately after vendor selection (hot wash-up) - Again at 6 months post-implementation - Final update at 12 months post-implementation

What Went Well: - Effective practices - Tools/templates that helped - Team collaboration highlights - Vendor relationship positives

What Could Be Improved: - Process inefficiencies - Missing criteria - Timeline issues - Communication gaps

Surprises/Unexpected Issues: - Vendor behaviors - Technical discoveries - Budget variances - Stakeholder concerns

Recommendations for Next Time: - Process improvements - Additional criteria to consider - Better time estimates - Stakeholder engagement tips

Pro Tips: - Schedule dedicated lessons learned session - Invite all evaluation team members - Be honest and constructive - Share with broader organization - Update templates based on learnings

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Sheet 9: Build vs Buy vs Rent Analysis

Purpose: Strategic decision - should you build, buy, or rent (SaaS)?

How to Use This Analysis:

Step 1: Understand Each Option

BUILD (In-house Development): - Pros: Full control, custom fit, no licensing fees - Cons: High initial cost, ongoing maintenance, resource intensive - Best for: Unique requirements, strong dev team, long-term strategy

BUY (Commercial License): - Pros: Feature-rich, vendor support, faster deployment - Cons: Licensing costs, vendor dependency, customization limits - Best for: Standard requirements, proven need, dedicated budget

RENT (SaaS/Cloud): - Pros: Low upfront cost, vendor maintains, scalable - Cons: Ongoing fees, less control, data residency concerns - Best for: Fast deployment, variable demand, OpEx vs CapEx preference

Step 2: Compare Total Cost of Ownership (5 years)

Review the pre-populated example in the sheet: - **Build**: Higher Year 1 (development), ongoing maintenance costs - **Buy**: Moderate Year 1 (license + implementation), lower ongoing - **Rent**: Lower Year 1 (subscription), consistent ongoing fees

Step 3: Use Decision Matrix

Score each option (1-5) on these dimensions: 1. **Time to Value**: How fast can we deploy? 2. **Total Cost**: 5-year TCO assessment 3. **Fit to Requirements**: How well does it meet needs? 4. **Risk**: Technical, vendor, implementation risks 5. **Flexibility**: Can we adapt/customize? 6. **Maintenance Burden**: Ongoing effort required 7. **Scalability**: Handles growth? 8. **Control**: Do we own the IP/data?

Step 4: Apply Organizational Factors

Different org types have different preferences: - **Large Enterprise**: Often BUY (budget, complexity) - **Mid-size Hospital**: Often RENT (balance cost/features) - **Small Clinic**: Usually RENT (limited IT staff) - **Tech-forward Org**: Might BUILD (innovation focus)

Recommendation Guidelines: - **BUILD IF**: - Unique requirements no vendor meets - Strong internal dev team (5+ engineers) - Long-term strategic advantage from custom solution - Budget >$2M over 5 years

- **BUY IF**:
- Standard requirements well-covered by vendors
- Proven ROI from feature set
- Dedicated IT team for operations
- Budget $1M-$3M over 5 years

- **RENT IF**:
- Fast deployment critical (<3 months)
- Variable/unpredictable demand
- Limited IT staff
- Prefer OpEx to CapEx
- Budget <$1M over 5 years

Sheet 10: Complexity Analysis

Purpose: Assess implementation complexity and risk for each vendor

How to Score Complexity (each factor rated 1-5):

1 = Low Complexity → Easy, standard, low risk **3 = Medium Complexity** → Moderate effort, some challenges **5 = High Complexity** → Difficult, significant challenges, high risk

Dimension 1: Technical Complexity (25 points max) - **Architecture Modernization** (5 points): - 1 = Drop-in replacement, same architecture - 3 = Some modernization (cloud migration) - 5 = Complete re-architecture required

- **Integration Points** (5 points):
- 1 = 1-3 systems to integrate
- 3 = 4-10 systems
- 5 = 10+ systems with custom protocols

- **Data Migration** (5 points):
- 1 = No migration needed
- 3 = Moderate data migration (<1TB)
- 5 = Complex migration (>1TB, legacy formats)

- **Custom Development** (5 points):
- 1 = Out-of-box solution
- 3 = Some configuration/scripting
- 5 = Extensive custom development

- **Infrastructure Changes** (5 points):
- 1 = Use existing infrastructure
- 3 = Some new infrastructure
- 5 = Complete infrastructure overhaul

Dimension 2: Integration Complexity (25 points max) Similar scoring for: - Legacy System Compatibility - API Maturity - Protocol Support - Real-time vs Batch - External Partner Integration

Dimension 3: Organizational Complexity (25 points max) - Stakeholder Alignment - Change Management - Training Requirements - Process Changes - Vendor Relationship Management

Dimension 4: Operational Complexity (25 points max) - Monitoring & Support - Disaster Recovery - Security Operations - Performance Tuning - Ongoing Maintenance

Dimension 5: Compliance Complexity (25 points max) - Regulatory Requirements - Audit Trail Setup - Security Certifications - Data Privacy Controls - Industry Standards

Interpreting Complexity Scores:

Total Score	Complexity Level	Recommended Approach
0-40	LOW	Standard implementation, 3-4 months
41-75	MEDIUM	Phased approach, 6-9 months
76-100	HIGH	Extensive planning, 12-18 months
101-125	VERY HIGH	Consider alternatives or major PMO

Risk Mitigation by Complexity: - **Low**: Standard project management, small team - **Medium**: Dedicated PM, phased rollout, pilot first - **High**: Executive sponsor, change management program, extensive testing - **Very High**: External consultants, multi-year program, consider simpler alternatives

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Sheet 11: SWOT Analysis

Purpose: Strategic analysis of each vendor option

How to Conduct SWOT:

For Each Vendor, Document:

STRENGTHS (Internal, Positive): - What does this vendor do exceptionally well? - Competitive advantages - Proven capabilities - Strong features - Example: "Best-in-class FHIR implementation, visual mapping tool, 99.99% uptime SLA"

WEAKNESSES (Internal, Negative): - Where does this vendor fall short? - Missing features - Technical limitations - Support gaps - Example: "Limited legacy system connectors, complex pricing model, steep learning curve"

OPPORTUNITIES (External, Positive): - How could this vendor help us grow/improve? - Future roadmap alignment - Innovation potential - Partnership possibilities - Example: "AI-powered data transformation coming Q3, potential to expand to other use cases"

THREATS (External, Negative): - What external risks exist? - Market changes - Vendor viability concerns - Competition - Technology shifts - Example: "New competitor entered market with lower pricing, vendor acquired last year"

Using SWOT for Decision-Making:

1. **Strengths vs Weaknesses**: Must have more/stronger strengths
2. **Opportunities**: Can we capitalize on these?
3. **Threats**: Can we mitigate? Are they deal-breakers?

Comparative SWOT: After completing individual SWOTs, create comparative table:

Factor	Vendor A	Vendor B	Vendor C	Winner
Technical Strength	High	Very High	Medium	Vendor B
Cost	Medium	High	Low	Vendor C
Support	Low	High	Medium	Vendor B
Innovation	Medium	High	Low	Vendor B
Risk	Medium	Low	High	Vendor B

SWOT-Based Recommendation: - Vendor with most strengths and opportunities - Manageable weaknesses and threats - Aligns with strategic direction

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Scoring Guidelines

General Principles

1. **Score Based on Evidence**:
2.   Demonstrated capability
3.   Customer references
4.   Documentation proof
5. × Vendor promises
6. × Roadmap items

7. × Marketing claims

8. **Use Multiple Evaluators**:

9. Assign 2-3 people per category
10. Average scores to reduce bias

11. Discuss significant disagreements

12. **Document Everything**:

13. Use Notes columns extensively
14. Save vendor responses
15. Record demo sessions

16. Keep email trails

17. **Be Consistent**:

18. Use same scale/criteria for all vendors

19. Score at same time (within days)

20. Same evaluators for same categories

21. **Focus on Differentiators**:

22. If all vendors score high/low, consider removing criterion

23. Weight factors that truly distinguish vendors

24. Don't get lost in minutiae

Common Scoring Mistakes to Avoid

× **The Halo Effect**: One great feature makes everything look great   **Fix**: Score each criterion independently

× **Recency Bias**: Last vendor seems best   **Fix**: Review all vendors after all demos complete

× **Anchoring**: First vendor sets baseline   **Fix**: Use absolute scale, not relative comparison

× **Confirmation Bias**: Favoring pre-selected vendor   **Fix**: Blind scoring (hide vendor names during initial scoring)

× **Scoring Roadmap**: Giving credit for future features   **Fix**: Only score current, proven capabilities

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Decision Gates

Gate 1: After Initial Screening (Phase 1)

Criteria to Proceed: -   Passes compliance checklist (Sheet 2) -   Meets mandatory technical requirements -   Within budget range (rough estimate) -   No major red flags

Action: Proceed with 3-5 vendors to detailed evaluation

Gate 2: After Detailed Evaluation (Phase 2)

Criteria to Proceed: -   Weighted score ≥70 (Acceptable or better) -   No category scored <50% of max points -   Positive initial reference checks -   Stakeholder consensus

Action: Invite 2-3 vendors for demos

Gate 3: After Demos & References (Phase 4)

Criteria to Proceed: -   Demo score ≥7.0/10 average -   At least 2 positive reference calls -   No deal-breaker issues discovered -   Budget alignment confirmed

Action: Request BAFO from 1-2 finalists

Gate 4: Final Selection (Phase 6)

Criteria to Proceed: -   Clear winner emerged from scoring -   Executive sponsor approval -   Budget approved -   Contract terms acceptable -   Implementation plan agreed

Action: Contract signature and kickoff

Best Practices

1. Team Composition

Core Evaluation Team (5-8 people): - Project Lead (1): Overall coordination - Clinical Rep (1-2): Workflow/usability focus - IT Architect (1-2): Technical evaluation - Security Officer (1): Security/compliance - Procurement (1): Commercial terms

Extended Team (consulted as needed): - End users - Department managers - Legal counsel - Finance - Executive sponsor

2. Timeline Management

Realistic Timeline: 8-12 weeks total - Week 1-2: Initial screening - Week 3-5: Detailed evaluation - Week 6-7: Demos - Week 8-9: Reference checks - Week 10: BAFO - Week 11-12: Final decision

Don't Rush: - Poor vendor selection costs millions - Take time for thorough evaluation - Build in buffer time for delays

3. Vendor Management

Set Clear Expectations: - Share evaluation criteria upfront - Provide demo scenarios in advance - Set response deadlines - Be transparent about timeline

Maintain Fairness: - Same information to all vendors - Same evaluation process - No favoritism - Professional communication

Document Everything: - All vendor communications - Demo recordings - Q&A responses - Commitments made

4. Stakeholder Engagement

Early and Often: - Kick-off meeting with all stakeholders - Weekly status updates - Demo invitations (make it easy to attend) - Final presentation with leadership

Manage Expectations: - No perfect vendor exists - Trade-offs are necessary - Budget constraints are real - Implementation takes time

5. Risk Management

Identify Risks Early: - Technical integration challenges - Vendor stability concerns - Budget overruns - Timeline delays - Stakeholder misalignment

Mitigation Strategies: - Proof of concept for high-risk integrations - Escrow agreements for small vendors - Fixed-price contracts where possible - Phased implementation - Change management program

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Troubleshooting

Issue: Vendors score too similarly (all 70-80)

Solution: - Review weighting - may need adjustment - Focus on differentiating criteria - Conduct deeper technical demos - Check references more thoroughly

Issue: No vendor meets minimum score (all <70)

Solution: - Review if criteria are too stringent - Consider Build vs Buy analysis (Sheet 9) - Expand vendor search - Adjust budget/timeline expectations

Issue: Stakeholders disagree on scoring

Solution: - Facilitate discussion on specific criteria - Use weighted voting - Bring in neutral third-party - Focus on objective evidence, not opinions

Issue: Top-scoring vendor is most expensive

Solution: - Revisit cost weight (currently only 5%) - Conduct detailed ROI analysis - Negotiate pricing (BAFO process) - Consider total cost of ownership, not just price

Issue: Vendor makes promises not in scoring

Solution: - Get commitments in writing - Include in contract terms - Add penalty clauses for non-delivery - Re-score if truly game-changing

Issue: Demo reveals major gap after scoring

Solution: - Re-score affected criteria - Document as risk - Request BAFO to address gap - Consider if gap is show-stopper

Issue: Reference gives conflicting information

Solution: - Get multiple references (3-5) - Seek independent references - Verify with vendor (tactfully) - Weight demonstrated capability over references

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Appendix: Customization Guide

Adding Custom Criteria

1. Insert row in Sheet 3 (Evaluation Matrix)
2. Add criterion name
3. Assign weight (adjust others to keep total at 100%)
4. Set scoring scale (document in notes)
5. Update formulas to include new row

Adjusting Category Weights

Current default: 35/30/20/10/5

Example alternatives: - **Security-focused org**: 25/25/30/10/10 - **Cost-sensitive org**: 30/25/15/10/20 - **Innovation-focused org**: 30/35/15/10/10

To change: 1. Update category headers in Sheet 3 2. Adjust individual criterion weights within category 3. Verify totals still equal 100% 4. Update subtotal formulas

Adding Vendors

1. Insert new columns (every 2 columns: Score + Weighted)
2. Copy formulas from adjacent vendor
3. Update column references in Grand Total

4. Add vendor to all other sheets

Translating to Another Language

- All text is editable
- Preserve formula structure
- Update dropdown values if used
- Test calculations after translation

Quick Reference Card

The 6-Phase Process

1. Initial Screening → 3-5 vendors
2. Detailed Evaluation → Score all criteria
3. Demonstrations → 2-3 vendors
4. Reference Checks → Validate claims
5. BAFO → Negotiate final terms
6. Final Selection → Make decision

Scoring Scales

- Functional: 1-10
- Technical: 1-5
- Security: 1-5
- Viability: 1-3
- Commercial: 1-4

Decision Thresholds

- 90+ = Excellent
- 80-89 = Good
- 70-79 = Acceptable
- 60-69 = Marginal
- <60 = Not Recommended

Key Deliverables

- [ ] Compliance checklist completed

- [ ] All vendors scored

- [ ] Demos conducted and scored

- [ ] References checked (3+ per vendor)

- [ ] BAFO received and analyzed

- [ ] Final recommendation documented

- [ ] Executive approval obtained

Support & Questions

Document Version: 2.0
Last Updated: November 30, 2025
Author: Healthcare IT Evaluation Framework Team

For questions about using this framework: - Review the README.md file - Check the Process Flow diagram - Refer to the Quick Reference card - Consult with your IT evaluation team

Additional Resources: - KLAS Research (healthcare vendor ratings) - Gartner Magic Quadrants - HIMSS Interoperability Showcase - HL7 International (standards) - FHIR.org (FHIR specifications)

Good luck with your vendor evaluation!

Remember: Take your time, be thorough, and document everything. A good vendor selection process today prevents years of problems tomorrow.