

Evaluation Checklist

Use this 1-page checklist to run a focused evaluation across Product, IT, Security, and Finance. Link each answer to evidence (docs, screenshots, or a short Loom).

1) Fit & Scope

- ✓ Primary goals & top 3 outcomes are defined and owned.
- ✓ Critical systems in scope (ERP/CRM/WMS/Support) are identified.
- ✓ Edition fit short-list agreed (DayOne · Integration & Analytics · Commerce · AiA).
- ✓ Timeline and decision gates confirmed (see POV plan).

2) Edition Comparison - Key Questions

- ✓ Does the edition map to team roles and required capabilities?
- ✓ What is 'recommended for' guidance for our size/complexity?
- ✓ Any gaps vs. must-have features? List mitigations or workarounds.

3) Architecture & Integrations

- ✓ ERP-first data model documented with entity & KPI lineage.
- ✓ Integration paths confirmed (SAP ECC/S4, NetSuite, Dynamics, etc.).
- ✓ Data migration, quality checks, and alerting approach clarified.
- ✓ Access model reviewed (RBAC/SSO) with environments and logging.

4) Security & Compliance

- ✓ SSO options, role scopes, and audit trails are supported.
- ✓ PII handling and data residency options meet policy requirements.
- ✓ Vendor Trust Center reviewed; security pack attached to the record.

5) Proof-of-Value (POV) · 4-Week Plan

- ✓ Week 1: Outcomes & owners · KPI list · data model sketch.
- ✓ Week 2: Connect priority systems (read) · publish first KPIs.
- ✓ Week 3: Pilot (Commerce or AiA) with clear success criteria.
- ✓ Week 4: Review results vs. gates; decide to pause/scale.

6) TCO & ROI

- ✓ Calculator run on our assumptions (hours, rates, probabilities).
- ✓ Year-1 savings ranges reviewed: Conservative · Base · Stretch.
- ✓ Program cost itemized (enablement + platform).

Decision Log & Next Steps

Owner: _____ Target decision date: _____

Notes / Risks / Open Questions:

Helpful links: [Edition Comparison](#) · [Architecture Matrix](#) · [Trust Center](#) · [ROI Calculator](#) · [POV Plan](#)