Vendor Demo Evaluation Checklist

Use this guide during every vendor demo to ensure alignment, clarity, and a smoother partnership.

1. Company Fit & Value Alignment

- ☐ What problem does this solution solve for our dealership?
- ☐ Is the vendor familiar with our dealership size, structure, and market?
- ☐ Are there similar dealers currently using this product?
- ☐ Does this vendor align with our dealership's goals, culture, and values?

2. Product/Service Overview

- ☐ What is the core functionality of this tool?
- ☐ How does it integrate with our current systems (CRM, DMS, inventory, etc.)?
- ☐ Is it customizable to our dealership's needs?
- ☐ What makes this product different from others in the market?

3. Onboarding Process

- ☐ What does the onboarding timeline look like?
- ☐ Who will be our main point of contact during onboarding?
- ☐ What internal resources will be required from our team?
- ☐ Is training provided? If so, how is it delivered (live, recorded, on-site)?

4. Support & Communication

- ☐ Is there a dedicated account manager?
- ☐ What's the support availability (hours, methods of contact)?
- ☐ How are updates, issues, or outages communicated?
- ☐ What's the typical response time for support requests?

5. Pricing & Contract Terms

- ☐ What is the total monthly/annual cost?
- ☐ Are there any additional or hidden fees (setup, data migration, etc.)?
- ☐ What are the contract terms (length, cancellation policy)?
- ☐ Is there a trial or pilot program available?

6. Results & Accountability

- ☐ What results should we expect in 30/60/90 days?
- ☐ How is success measured and reported?
- ☐ What KPIs or performance benchmarks are shared with us?
- ☐ What happens if performance expectations are not met?

7. Long-Term Partnership Considerations

- ☐ What does ongoing communication look like after onboarding?
- ☐ How often will we meet to review performance?
- ☐ Are there opportunities for feedback and product improvement?
- ☐ Can the vendor scale with us as we grow?