**VENDOR REVIEW TEMPLATE**

**What’s My Exact Need?** (What specific outcome or detailed service do I want from this vendor?)

**Answer:**

**Must-Haves**

**1-**

**2-**

**3-**

**Nice-to-Haves  
1-**

**2-**

**3-**

**Bonus Points**

**1-**

**2-**

**3-**

**Vendor Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Review Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Pricing Transparency & Flexibility**

How clear and predictable is their pricing? Are there any hidden fees or fine print?

**Notes:**

**References & Proof**

Can they share relevant case studies, testimonials, or connect me to a similar client?

**Notes:**

**Industry Alignment & Understanding** (Do they understand my type of business and needs?)

**Notes:**

**Onboarding & Handoff Process** (What does onboarding/transition look like?)

**Notes:**

**Responsiveness & Support** (How quickly do they respond—and who’s my main contact in a pinch?)

**Notes:**

**Contract Terms & Exit Options**

Is it easy to adjust or leave the agreement if things aren’t working? Any surprise restrictions or penalties?

**Notes:**

**Your Own Questions:**