

Building management software evaluation scorecard

Use the same criteria and scoring scale for every provider.

BUILDING / SCHEME	PROVIDER 1	PROVIDER 2	PROVIDER 3	PROVIDER 4

Rate each criterion from 1 (poor) to 5 (excellent).

Weighted totals calculate automatically in compatible PDF readers; they can also be entered manually.

CRITERION	WHAT TO ASSESS	WEIGHT	PROVIDER 1	PROVIDER 2	PROVIDER 3	PROVIDER 4
Core functionality	Maintenance, work orders, contractors, assets, communication and reporting.	25%				
Ease of use and admin burden	How quickly people can learn it and whether it removes duplicate entry and follow-up.	25%				
Company, team and support	Visible people, relevant experience, references and access to a real support team.	15%				
Security and reliability	Hosting, access controls, backups, incident response and evidence of reliable operation.	10%				
Migration and implementation	A realistic migration plan, onboarding help, training and a clear path to go live.	10%				
Total cost	Subscription, setup, migration, support and charges that appear after year one.	15%				
WEIGHTED TOTAL / 100						

12 questions to ask every provider

2 of 2

Put the same questions to each shortlisted provider and record the answers in your meeting notes.

Product, implementation and support

Ask the questions plainly. Useful providers should be comfortable answering them.

- 1 Can you show us a maintenance request from report to resolution?
- 2 How much ongoing administration will this add or remove?
- 3 What can a new committee member or manager do without training?
- 4 Who owns implementation, migration and training?
- 5 Who will support us, and what response times do you commit to?
- 6 What happens if our main contact or key product staff leave?

Cost, risk and evidence

Look for clear evidence, not a bigger feature list or a more polished pitch.

- 7 Which features in this proposal are live today?
- 8 What are all first-year and ongoing costs?
- 9 How are our records secured, backed up and recovered?
- 10 Can we export all records in a usable format at any time?
- 11 Can we speak with comparable buildings using the product?
- 12 What do your least successful customers tend to struggle with?

Stress-test the decision

Consider the upside and downside before the final vote.

BEST CASE: WHAT BECOMES MEASURABLY EASIER IN 12 MONTHS?

WORST CASE: IF DELIVERY DISAPPOINTS, WHAT IS THE COST AND EXIT PATH?

PREFERRED PROVIDER

DECISION / NEXT STEP