

The Evaluation Worksheet

Using the accompanying worksheet, you will be able to score each vendor based on the five key components of social advertising technology platforms. As you score each platform, you will eventually get a final vendor score which will help you with your final decision.

Choose your evaluation criteria

We have provided some of the common evaluation criteria as a starting point but you should go through and determine the most important features and functionality for your social ad program. Feel free to remove or add categories and sections.

Determine your rating system

Here's a standard 10 point scoring system:

- 10** Absolute leader in this category
- 8 - 9** Strong player
- 6 - 7** Fair but could do better
- 4 - 5** Some capability here but not any strength
- 2 - 3** Very concerning
- 0 - 1** Complete lack of functionality

Once again, this is a starting point. You can simplify this rating down to a 3 or 5 point system or even increase it up to 0-100% percentages for each.

Define your scoring system

Not every category or functionality should have equal weighting in your final decision. Go through and set weighting by section and then again by category.

Vendor Name	Category	Functionality	% of Category Score	Vendor Raw Score	Vendor Weighted Score	
	Workflow & User Interface (UI)					
		UI				
		Intuitive navigation	9%	8	0.72	<i>Very easy to get around.</i>
		Clean layout	9%	7	0.63	<i>Uncluttered...good looking dashboard</i>
		Page load speed	9%	5	0.45	<i>Kinda slow. Told it was the demo</i>
		Customizable	9%	9	0.81	<i>Really amazing platform for customer</i>
		Help section	9%	2	0.18	<i>Very basic, just a glossary and FAQ</i>
		Admin control	9%	3	0.27	<i>Didn't have some of the things we</i>
		Workflow				
		Improves upon native tool	9%	8	0.72	
		Targeting capabilities	9%	3	0.27	
		Workflow automation	9%	6	0.54	
		Time savings	9%	5	0.45	
		Multi-user support	10%	2	0.2	
			100%			

Evaluate the platforms

Via your RFP, demo, reference calls, and other processes, you will be able to score each category accordingly. As you go through the process, you will become more educated on how to score each provider so it's okay to go back and change your scoring. For example, you may rank a provider low for a category in the beginning of your evaluation process but then realize after seeing all of the vendors that they are actually doing better (or worse) than you originally thought. It's okay to go back and modify the score, but make sure of your decision before you make any change.

There's a notes field provided for you to keep track of anything you want to remember later. This can be very helpful as the evaluation process may span weeks or even months. The better notes you take, the easier your final review will be.

Final scoring

Just because one provider has a higher score than the rest, the final decision is still up to you. You may end up going with the second provider on the list for business reasons that far outweigh the actual the scoring calculations. This evaluation worksheet is only meant to be a helpful tool during the process and feel free to use it as such.