

Automation consultant evaluation checklist

Compare qualified providers against the same operational requirements and evidence.

Project / provider

Evaluation owner

☐**Define the requirement**

Describe the problem, scope, existing systems and desired outcomes.

☐**Request diagnostic evidence**

Ask for a method and a relevant sanitized work sample.

☐**Check integration capability**

Discuss actual system constraints, authentication and recovery.

☐**Require measurable scope**

Compare deliverables, dependencies, exclusions and acceptance criteria.

☐**Review testing and access controls**

Ask for failure scenarios, permission boundaries and escalation ownership.

☐**Compare total cost consistently**

Include subscriptions, usage, internal effort, support and change requests.

☐**Clarify ownership and handover**

Confirm accounts, configurations, documentation, training and exit terms.

☐**Document the selection rationale**

Use consistent criteria and record gaps; escalate any critical requirement failure.

MAKE THE NEXT DECISION

Next decision: shortlist, request clarification, commission a scoped diagnostic, or decline. A high score does not override a mandatory security or delivery requirement.

Which evidence supports the choice, and what must be resolved before signing?