

Factors to Consider When Selecting a SaaS Vendor

A Checklist to Help MSPs Make the Right Choice

Selecting a vendor can be tricky. But it doesn't have to be. CompTIA's SaaS Ecosystem Industry Advisory Council put together a list of key factors to consider when evaluating vendors, including security considerations, time to value, integrations, and more. With this checklist, you can feel more confident that you're making the right choice for you and your clients.

Vendor Name: _____

Sales Rep Name: _____

Contact Info: _____

- The vendor provides a
 - Product
 - Service
 - Not applicable
- Number of years in business
 - <1 year
 - 1-3 years
 - 3-5 years
 - 6-9 years
 - 10+ years
 - Not applicable
- Number of active partners/clients
 - 1-25
 - 26-100
 - 101-250
 - 251-1000
 - 1001-2500
 - 2501+
 - Number of new clients added per month: _____
- Expected business outcome(s)
 - Improved efficiencies
 - Reduced risk
 - Increased revenue
 - Not applicable
- Pre-sale experience
 - NFR licenses
 - Demo available
 - No commitment, free trial
- Post-sale experience
 - Training
 - Certification
 - Brandable marketing content
- Implementation/deployment time (per client/tenant)
 - Minutes
 - Hours
 - Days
 - Weeks
 - Months
 - Actual time: _____
 - Not applicable
- Contract requirements
 - Month to month
 - Annual
 - Minimum duration/commitment
 - Not applicable
- Pricing model
 - Minimum commitment
 - Local currency support
- Billing methods
 - Credit card
 - ACH
 - Invoice
 - Net terms: _____
 - Not applicable
- Ongoing management
 - Self-managed
 - Support time per client per month
 - None
 - Minutes
 - Hours
 - Vendor managed
 - Not applicable
- Compliance frameworks
 - GDPR
 - HIPAA
 - ISO 27001
 - SOC2 type: _____
 - Other: _____
 - Not applicable

- Support considerations
 - Location
 - Domestic
 - International
 - Availability
 - 24/7
 - 9-5
 - Type
 - Email
 - Phone
 - Chat
 - Knowledge-base articles
 - Not applicable
- Type of data stored in the platform
 - PII
 - PHI
 - Financial
 - Credential
 - Other sensitive data: _____
 - Not applicable
- Access methods
 - SSO
 - MFA
 - Role-based access control
 - Not applicable
- Environment details
 - On-premises
 - Cloud
 - AWS
 - Azure
 - GCP
 - Other: _____
 - Hybrid
 - Zone:
 - US
 - Canada
 - EMEA
 - APAC
 - LTAM
 - Other: _____
 - Not applicable
- Multitenancy
 - Yes
 - No
 - Management templates (“global rules”)
 - Not applicable
- Integrations
 - PSA
 - RMM
 - Billing platform
 - Identity provider/productivity stack
 - API available?
 - Is there a cost for API/integrations?
 - Yes
 - No
 - Not applicable

Summary

Hopefully this checklist helps to simplify the vendor evaluation process. However, it’s important to note that this list is not comprehensive, and you may require additional considerations beyond what is listed here.

It’s always a good idea to do your own research and consult with other industry professionals before making a final decision. By taking the time to carefully evaluate your options, you can feel confident that you’re making the best choice for your business and clients.

About the SaaS Ecosystem Industry Advisory Council

The CompTIA SaaS Ecosystem Industry Advisory Council is a group of thought leaders and subject matter experts representing cloud software platforms and applications. Our members provide valuable insight that helps develop resources and tools to help achieve specific business objectives and advance the Software as a Service (SaaS) industry.

