

Technology Evaluation Checklist

A practical, vendor-neutral checklist for schools, universities, and organizations preparing to evaluate, implement, replace, integrate, or extend an information system.

How to use it: complete the checklist with process owners, IT, data owners, and representative users. Record evidence, unresolved decisions, and accountable owners rather than relying on yes/no impressions.

1. Outcomes and scope

■	Define the operating outcome State what should become clearer, faster, more reliable, or easier to govern.	■ Ready ■ Partial ■ Gap
■	Name the in-scope processes List the processes, departments, campuses, products, and user groups included.	■ Ready ■ Partial ■ Gap
■	Separate must-haves from preferences Identify regulatory, policy, operational, and timing constraints.	■ Ready ■ Partial ■ Gap
■	Set decision ownership Name the sponsor, process owners, technical owners, and final approver.	■ Ready ■ Partial ■ Gap
■	Define success evidence Specify measurable acceptance criteria and how they will be validated.	■ Ready ■ Partial ■ Gap

2. Users, work, and adoption

■	Map user roles Include administrators, faculty, staff, students, families, managers, and support teams as relevant.	■ Ready ■ Partial ■ Gap
■	Document current workflows Capture actual work, exceptions, approvals, handoffs, and seasonal peaks.	■ Ready ■ Partial ■ Gap
■	Identify configuration needs Distinguish configuration, integration, migration, customization, and policy change.	■ Ready ■ Partial ■ Gap
■	Plan user participation Include demonstrations, fit/gap review, prototyping, UAT, training, and checkpoints.	■ Ready ■ Partial ■ Gap
■	Prepare adoption support Define communications, role-based training, reference material, and post-launch assistance.	■ Ready ■ Partial ■ Gap

3. Data and integrations

■	Inventory source data List systems, spreadsheets, files, owners, formats, quality issues, and retention needs.	■ Ready ■ Partial ■ Gap
■	Define data authority Identify the system of record and ownership for each critical entity.	■ Ready ■ Partial ■ Gap
■	Assess migration quality Plan cleansing, mapping, transformation, reconciliation, exception handling, and sign-off.	■ Ready ■ Partial ■ Gap
■	Map integrations Document direction, frequency, triggers, API or file methods, security, and failure handling.	■ Ready ■ Partial ■ Gap
■	Plan continuity Define cutover, coexistence, rollback, backup, archive access, and audit requirements.	■ Ready ■ Partial ■ Gap

4. Security, deployment, and continuity

■	Choose deployment approach Confirm cloud, on-premises, or hybrid requirements and operational responsibilities.	■ Ready ■ Partial ■ Gap
■	Define identity and access Cover SSO, MFA, role-based access, segregation of duties, and user lifecycle.	■ Ready ■ Partial ■ Gap
■	Review protection controls Address encryption, logging, vulnerability management, privacy, and data residency.	■ Ready ■ Partial ■ Gap
■	Set availability expectations Define support hours, monitoring, recovery objectives, backup testing, and escalation.	■ Ready ■ Partial ■ Gap
■	Document environments Plan development, test, training, UAT, production, refresh, and release controls.	■ Ready ■ Partial ■ Gap

5. Delivery and commercial readiness

■	Create a phased plan Define discovery, design, configuration, migration, testing, training, launch, and stabilization.	☐ Ready ☐ Partial ☐ Gap
■	Clarify responsibilities Use a responsibility matrix for customer, provider, and third-party work.	☐ Ready ☐ Partial ☐ Gap
■	Validate estimates and dependencies Tie cost and timing to scope, data quality, integrations, decisions, and availability.	☐ Ready ☐ Partial ☐ Gap
■	Confirm acceptance and change control Define deliverables, approval gates, issue management, and scope-change handling.	☐ Ready ☐ Partial ☐ Gap
■	Assess long-term fit Review roadmap alignment, configurability, support model, maintainability, and exit options.	☐ Ready ☐ Partial ☐ Gap

Evaluation Summary

Use this page to convert discussion into a decision record.

Area	Evidence / decision	Owner	Status
Outcomes and scope			
Users and adoption			
Data and integrations			
Security and deployment			
Delivery and commercials			
Key risks			
Decision and conditions			

This checklist supports structured evaluation; it does not replace legal, security, privacy, procurement, or technical due diligence appropriate to your organization.