INTRODUCTION: Vendor/Partner Assessment Checklist

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What This Is

Checklist for assessing any outside contractor or third-party organization you are considering using for your project. For example, vendor or partner types can include:

Partner Type	Description - the outside entity is engaged to
Full project partner – turn-key	Execute an entire project in the portfolio
Development partner – turn-key	Execute the entire technical development effort for a project
Manufacturing Partner – turn-key	Manufacture the product created by the hiring company
Development partner – integrated	(Firm or individual contractor) Execute part of the technical development effort for the project, working side-by-side with company developers
Other cross-functional partner – integrated	Execute a cross functional aspect of the project (e.g. create technical publications for the product being developed)
Technical advisor	Review elements of the project, taking responsibility for soundness of design etc.

Why It's Useful

Virtual teams with an outsourced component present special challenges to a project manager. Many things can go wrong when a project depends upon help from outside the company. This checklist ensures that you've probed for hidden sources of potential trouble so that risk management and other appropriate actions can be taken as part of project investigation and planning.

How to Use It

1. Use this checklist (and add your own items) as soon as you begin interviewing any outside resources. Note that the list applies even if you're planning to use resources you've already used on past projects, as some items are situational. Fill out each item for a partner you're considering.

2. The results of the assessment will drive key activities during project planning and investigation of project alternatives. For instance, if the company has mismatches in their development processes, time will have to be spent up front to agree on what process steps and deliverables will be followed.

3. Schedule any activities needed to get in sync with potential or current partners on tools, processes, priorities, etc.

4. Identify checkpoints during your project when you'll revisit this list and ensure that work with the partner is still meeting requirements.

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Give potential partners a score, with 5 meaning the strongest match, and 1 the weakest. Use this simple mechanism to identify problem areas to address before engaging a vendor. Some items can provide fodder for a contract—aspects you want to clearly articulate as a contractual requirement with the partner.

Values, Goals:	Score (1-5)/ Notes
Does this project provide a clear short-term win for both companies?	
Do the outside resources understand the "return on investment" goals of this project and the feature, technical, schedule, and cost trade-offs that are acceptable? Are they willing to discuss the tradeoffs, willing to accept your rulings on which items are flexible vs. which must be met?	
Will they commit to your project schedule and deliver? Are they willing to show that commitment by putting schedule commitments into the contract, and possibly even having incentives or penalties tied to making those dates?	
How similar are your company cultures—will there be significant effort required to get the teams to work together well?	
Do both sides see the potential for a longer-term relationship—are there enough synergies and opportunities for long-term business together, with identifiable return for both companies? Otherwise it might not be worth the effort that will be required to form and manage an effective partnership, just for one project.	
Are they interested in participating in your industry in the long term? Is this industry part of their own strategic business plan, but in a complementary way? (Or can you see future scenarios in which they'd compete with you?)	
Are they truly interested in the type of technical work required by this project, or are they taking this project as a stopgap until they find the work they actually want to do?	
Do they share your vision of technology and market developments?	
Skills, experience, capabilities:	
Have they done this kind of work before? Do they have the appropriate technical skills? Do they have extensive experience using these technical skills, and a **track record** of related on-time projects and high-quality products? Do they have experience *in your industry*? Are they willing to give you references so that you can verify this experience?	
Do you have a say in what level person works on your project, e.g. junior engineer vs. senior engineer? For third-party development organizations, the skill level and experience required should be defined in the contract.	
What are the communication skills of the individuals, both verbal and written? Will they be able to communicate both technical and management information? Especially for the project manager, executive sponsor, and any technical/functional coordinators in the partner.	
Do they have experience with the development and testing tools to be used?	
Do they produce usable, complete technical documentation? Are they willing to show you samples of such documentation?	
What are the technical and project management skills of the managers in the outside organization and can they be counted on to manage their aspects of the project? Do they know how to estimate project work; can you count on the accuracy of their project bid?	