**The Essential Nonprofit Software Selection Guide and Worksheet**

**Software Evaluation Worksheet**

**Instructions:** Complete this worksheet for each software system you are evaluating by typing notes in the spaces for each evaluation topic. Use each completed worksheet to conduct side-by-side comparisons of each software system during your software selection process.

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| **1** | **Vendor Name** |  |
| **Primary Contact Info** |  |

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| **2** | **Company Demographics** | Customer Count | 1st Year Customer Retention | Company Stability |
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| **3** | **Implementation** | Description of Process | What is required of us? |
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| **4** | **Ongoing Support** |  |

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| **5** | **Training** | Implementation | Ongoing |
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| **6** | **Demo** | Likes | Dislikes |
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| **7** | **Free Trial** | Likes | Dislikes |
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| **8** | **Customer References** | Customer #1 | Customer #2 | Customer #3 |
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| **9** | **Scalability and Flexibility** |  |

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| **10** | **Add-ons** |  |

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| **11** | **Strengths and Limitations** | Strengths | Limitations |
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| **12** | **Primary Differentiator** |  |

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| **13** | **Total Cost** | Year 1 | Year 2 |
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| **14** | **Exit Process** |  |

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| **15** | **Other Notes** |  |