

BPO software evaluation checklist

25 questions for attendance, client reporting, and controlled work visibility. Use the same evidence standard with every vendor; test dummy data in the actual paid configuration.

Vendor / plan: _____

Evaluator / date: _____

Attendance & shifts

- 1 Can the platform compare scheduled shifts with recorded time, including late starts and partial attendance?
☐ Verified ☐ Gap ☐ Not tested Evidence / paid plan / follow-up: _____
- 2 How does a 10 PM–6 AM shift appear in the schedule, attendance report, and export?
☐ Verified ☐ Gap ☐ Not tested Evidence / paid plan / follow-up: _____
- 3 How are leave, breaks, reporting time zones, and schedule changes represented and reviewed?
☐ Verified ☐ Gap ☐ Not tested Evidence / paid plan / follow-up: _____

Client reporting

- 4 Can a client view only its own approved account report, without accessing another client's records?
☐ Verified ☐ Gap ☐ Not tested Evidence / paid plan / follow-up: _____
- 5 Which fields and exports can each client role access, and how are viewer permissions revoked?
☐ Verified ☐ Gap ☐ Not tested Evidence / paid plan / follow-up: _____
- 6 Which operational system supplies every SLA or quality measure, and can its definition be reconciled?
☐ Verified ☐ Gap ☐ Not tested Evidence / paid plan / follow-up: _____

Time & billing

- 7 Can an agent allocate work to two client accounts and reconcile recorded hours by task?
☐ Verified ☐ Gap ☐ Not tested Evidence / paid plan / follow-up: _____
- 8 How are incorrect time entries corrected, approved, and retained with an appropriate review history?
☐ Verified ☐ Gap ☐ Not tested Evidence / paid plan / follow-up: _____
- 9 Which reviewed record governs billing or payroll inputs, and how are activity discrepancies resolved?
☐ Verified ☐ Gap ☐ Not tested Evidence / paid plan / follow-up: _____

BPO vendor evaluation · continued

Record demonstrated evidence and unresolved questions. A software feature does not establish service quality or a complete payroll workflow.

Vendor / plan: _____

Evaluator / date: _____

Screenshots & privacy

10 When does capture occur, on which displays, and can it be limited to the justified working scope?

☐ Verified ☐ Gap ☐ Not tested

Evidence / paid plan / follow-up: _____

11 Does blurring protect or retain original images, and who can view, export, or delete each version?

☐ Verified ☐ Gap ☐ Not tested

Evidence / paid plan / follow-up: _____

12 Can sensitive applications be excluded, and how are personal-device boundaries and retention enforced?

☐ Verified ☐ Gap ☐ Not tested

Evidence / paid plan / follow-up: _____

Workforce analytics

13 Can reviewers relate schedules, available capacity, workload, and delivery requirements without using an activity ranking?

☐ Verified ☐ Gap ☐ Not tested

Evidence / paid plan / follow-up: _____

14 Can classifications vary by role or team, and are calls, meetings, and offline work represented fairly?

☐ Verified ☐ Gap ☐ Not tested

Evidence / paid plan / follow-up: _____

Security

15 Can the exact required event be detected, alerted, or prevented in an authorized dummy-data test?

☐ Verified ☐ Gap ☐ Not tested

Evidence / paid plan / follow-up: _____

16 Which security controls, deployment terms, audit evidence, and access boundaries apply to the purchased configuration?

☐ Verified ☐ Gap ☐ Not tested

Evidence / paid plan / follow-up: _____

BPO vendor evaluation · continued

Record demonstrated evidence and unresolved questions. A software feature does not establish service quality or a complete payroll workflow.

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Integrations

17 Are the required APIs, service-system connections, and payroll integrations available in the quoted plan?

☐ Verified ☐ Gap ☐ Not tested Evidence / paid plan / follow-up: _____

18 Do exports preserve account scope, approval status, dates, and the values used for client billing?

☐ Verified ☐ Gap ☐ Not tested Evidence / paid plan / follow-up: _____

Deployment

19 Does the selected agent support the required devices, operating systems, connection patterns, and multi-device arrangements?

☐ Verified ☐ Gap ☐ Not tested Evidence / paid plan / follow-up: _____

20 How will employees understand collection, raise corrections, and transition between client accounts?

☐ Verified ☐ Gap ☐ Not tested Evidence / paid plan / follow-up: _____

Pricing

21 Which monitored employees, reviewers, managers, admins, and clients are billable, and what minimums apply?

☐ Verified ☐ Gap ☐ Not tested Evidence / paid plan / follow-up: _____

22 Does the quote include every demonstrated feature, capture setting, retention period, and required add-on?

☐ Verified ☐ Gap ☐ Not tested Evidence / paid plan / follow-up: _____

23 What are the annual license, integration, support, implementation, and ongoing administration costs?

☐ Verified ☐ Gap ☐ Not tested Evidence / paid plan / follow-up: _____

Exit & data retention

24 How are retained records, originals, exported copies, and backups handled after deletion or contract termination?

☐ Verified ☐ Gap ☐ Not tested Evidence / paid plan / follow-up: _____

25 How are client access, integrations, and accounts revoked, and how can the organization export its permitted records?

☐ Verified ☐ Gap ☐ Not tested Evidence / paid plan / follow-up: _____

Final decision: ☐ Proceed ☐ Narrow scope ☐ Change workflow ☐ Different tool

Record unresolved requirements, owners, and the next review date.

Annual licenses = monitored employees × monthly plan rate × 12. Add annual extras, implementation, and administration separately.