

FREE TEMPLATE

IT Vendor Assessment Template for Canadian SMBs

45-Criteria Framework for Evaluating & Scoring IT Service Providers

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Purpose	Evaluate and compare IT service providers before signing a managed services contract
How to Use	Score each criterion 1–5. Total the scores. Weight sections by importance to your business. Compare vendors side-by-side.
Scoring Guide	1 = Not present / unacceptable 2 = Partially met 3 = Met 4 = Exceeds expectations 5 = Excellent
Recommendation	A minimum score of 3 on every criterion in the Security and Compliance sections before proceeding to contract.

SECTION 1 — CREDENTIALS & EXPERIENCE

Criterion	Notes / Evidence	Score (1–5)
Named principals with verifiable certifications	Ask for cert numbers	___
Years of active MSP experience	Not just IT experience generally	___
Demonstrated experience with businesses your size	Ask for examples	___
Demonstrated experience in your industry	Compliance knowledge required	___
Canadian-based operations and staff	Data residency implications	___
References available from current clients	Minimum 2 references	___
Verifiable business registration	Ontario incorporation preferred	___

CREDENTIALS & EXPERIENCE Section Score: ___ / 35

SECTION 2 — SECURITY PRACTICES

Criterion	Notes / Evidence	Score (1–5)
Written cybersecurity policy for their own operations	Request a copy	___
Cyber liability and E&O; insurance in place	Request certificate	___
Regular internal security assessments conducted	Ask for frequency	___
Staff background checks performed	For staff with client access	___
MFA enforced on all vendor staff accounts	Non-negotiable in 2026	___
Privileged access management for client systems	Separate admin credentials	___
Incident response plan documented and tested	Ask for last test date	___
Dark web monitoring of own domain	Leading by example	___

SECURITY PRACTICES Section Score: ____ / 40

SECTION 3 — SERVICE DELIVERY

Criterion	Notes / Evidence	Score (1–5)
Response time commitments documented in SLA	Critical / non-critical defined	___
Escalation path clearly defined	Who do you call if primary contact unavailable	___
24/7 monitoring capability for Premium services	Tool name and coverage	___
RMM platform used (named)	Assess maturity of toolset	___
PSA/ticketing system used (named)	Track record of ticket resolution	___
On-site response capability in your area	Travel time estimate	___
Defined onboarding process documented	First 30 days structured	___
Monthly reporting included	Sample report available	___

SERVICE DELIVERY Section Score: ____ / 40

SECTION 4 — COMPLIANCE KNOWLEDGE

Criterion	Notes / Evidence	Score (1–5)
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PIPEDA compliance knowledge demonstrated	Can explain the 10 principles	___
Quebec Law 25 knowledge (if Quebec customers)	In force since Sept 2023	___
PHIPA knowledge (if healthcare)	Ontario specific	___
FINTRAC knowledge (if financial services)	AML requirements	___
Canadian data residency capability	Cloud infrastructure in Canada	___
Breach notification process understood	OPC notification requirements	___
Compliance documentation provided to clients	Gap analysis, reports	___

COMPLIANCE KNOWLEDGE Section Score: ___ / 35

SECTION 5 — CONTRACT & COMMERCIAL TERMS

Criterion	Notes / Evidence	Score (1–5)
Pricing is transparent and itemized	No hidden fees	___
Contract term is reasonable (12 months standard)	Month-to-month option available	___
Termination clause is fair	Notice period and data return	___
Data ownership clearly stated	Your data remains yours	___
Subcontractor use disclosed	Who else has access to your systems	___
Service Level Agreement (SLA) is written	Uptime, response, resolution	___
Pricing includes device limits or per-user model	No surprise overages	___
Annual price increase terms defined	Capped or CPI-indexed	___

CONTRACT & COMMERCIAL TERMS Section Score: ___ / 40

SECTION 6 — CULTURAL FIT & COMMUNICATION

Criterion	Notes / Evidence	Score (1–5)
Communication style matches your team	Technical vs plain language	___
Proactive communication demonstrated in sales process	Did they ask the right questions	___
Response time during evaluation was prompt	Leading indicator of service	___

Willingness to provide references without hesitation	Confidence in their work	___
Clear explanation of what they will and won't do	Scope clarity	___

CULTURAL FIT & COMMUNICATION Section Score: ___ / 25

SCORING SUMMARY

Section	Max Score	Your Score	% Score
Credentials & Experience	35	___	___
Security Practices	40	___	___
Service Delivery	40	___	___
Compliance Knowledge	35	___	___
Contract & Commercial	40	___	___
Cultural Fit & Communication	25	___	___
TOTAL	215	___	___

Recommendation: Vendors scoring below 70% overall, or below 3 on any Security or Compliance criterion, should not proceed to contract without documented justification and risk acceptance by senior management.