

# A la Carte Vendor Planning and Evaluation Worksheet

Use this document to prepare for interviewing outsource candidates like marketing and promotional service providers, and individual outsource professionals.

Type of resource being sought (select one below):

Details/Comments:

Marketing Support

Virtual Assistant

Client Service Support

Paraplanner

CCO

CFO

Compliance

Operations specify type:

Other specify:

Service to be performed/outcome desired:

How will this service add value to the business? (check all that apply):

Solve

Alleviate

Enhance

Enable

Ensure

Describe how:

Timing (hrs. per week/length of project):

Start Date/End Date:

Estimated cost/budget:

Team member responsible for onboarding this outsource vendor/service provider:

# Outsource Candidate Checklist

Vendor/Candidate Name: Referred By:

Interviewed By: Date:

**Desired attributes (Examples: values alignment, has capacity, required skills/knowledge, other):**

Desired Attribute:	Yes/No:	Comments:
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## Vendor Interview Questions

Describe your expected outcomes and attributes of the relationship you're looking for to the vendor candidate. Then use these interview questions and record your notes as you query your resource about their unique abilities and discover how they might meet your needs.

- 1 Do you work on retainer or hourly? What are your service levels and costs for services?
- 2 What is the set of activities you provide for a given fee level?
- 3 Are there unique things about your service/skills we should know about?
- 4 What does the typical relationship look like as we start out?
- 5 What is your discovery process like?
- 6 Please describe how you work with us on an ongoing basis. (How often do you check in, etc.)

## Vendor Interview Questions (cont)

- 7 What do you need from us to get best results?
- 8 Are you willing to attend any of our internal meetings coordinate activities with our team?
- 9 Do they have an affinity for your special cause or mission?
- 10 Would we be one of your larger or smaller clients?
- 11 How long does it take to typically finish a project like ours (example a website, collateral materials, etc.)
- 12 Would I be working directly with you (the interviewee) on an ongoing basis, or do you assign someone to work with us later?

## Vendor Interview Questions (cont)

- 13 Do you do the actual copywriting, design, promotion, etc. or someone else?
- 14 Can we meet the others on your team?
- 15 What is your capacity to take us on right now?
- 16 Can you give any examples of how clients have had the best success implementing your services?
- 17 Where do you see that others have failed to use your services effectively, and how could we prevent that?
- 18 Do you have samples and/or references?



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