WORKING TEMPLATE

Vendor qualification summary

Check the evidence behind the offer.

Use this record to review a supplier against the actual requirement. Capture what is supported, what remains open, and what needs checking before the next step.

Prepared for / organization

Prepared by

Project / reference

Version / revision

Review date

Decision owner

How to use it

Record the source and date for each material claim. Separate stated capability from verified evidence. A completed worksheet does not guarantee supplier performance.

Type into the fields, save a copy, or print and write by hand. Keep entries brief and refer to attachments for longer evidence. Use the Word file when you need more space or additional sections.

Use this as a starting point. Adapt it to the assignment, available evidence and applicable organizational, legal and regulatory requirements. Agree final scope and deliverables separately and obtain appropriate professional review. The buyer retains decision and approval authority.

01 Requirement snapshot

Anchor the review to a defined need.

Requirement

Location

Timing

Vendor qualification summary

02 Supplier profile

Record the organization presented for review.

Legal name

Website

Primary contact

03 Capabilities and capacity

Connect claimed capability to the requirement.

Capability

Evidence

Capacity

Vendor qualification summary

04 Coverage and delivery model

Make roles, locations, and dependencies visible.

Service area

Delivery role

Dependencies

05 Documentation review

Use evidence-status labels consistently.

Document

Status

Reviewed date

Vendor qualification summary

06 References and performance evidence

Record approved evidence without unsupported conclusions.

Reference

Relevance

Verification status

07 Strengths, gaps, and risks

Separate favorable evidence from unresolved exposure.

Strength

Gap

Risk observation

Vendor qualification summary

08 Fit summary and follow-up

State the current disposition and required next action.

Fit summary

Open question

Owner

09 Decision and next action

The buyer or authorized reviewer records the decision. Name any conditions and the person responsible for the next step.

Decision / disposition

Conditions

Approved by

Approval date

Next action