

SOLUTION CRITERIA

View the market like an IDP analyst

Fill in the details to grade IDP solutions utilizing a criteria and scoring influenced by market analyst reports. Bring this tool to your next IDP PoC, demo, or solution discussion to vet vendors and solutions.

How to use this tool...

1. Define

Identify your most necessary document types and processes to improve with IDP. Offer a sample of complex and common documents for better insights.

2. Grade

Evaluate each criterion on a scale of 0-2.

- 0 FAIL
- 1 PASS
- 2 EXCELS*



*Use 2's sparingly to indicate exceedingly high satisfaction.

3. Evaluate Base Score

Use **BASE SCORE** for overall performance

- 7-10 Mixed strengths and gaps
- 11-14 Capable solution
- 15-19 Strong solution
- 20+ Exceptional solution (rare)

Head-to-head comparisons

Add a multiplier to any criterion that describes a priority or must have solution feature/quality.

Priority x1.5

Must Have x2

Use **WEIGHTED SCORES** to compare two vendors in areas that matter most to your business.

Save or print the next page for an interactive criteria to go.

For more intelligent document processing expertise and consultation, call 864-343-0420 or email us at sales@keymarkinc.com

Vendor Name:

Date:

Base Score
Weighted

Criterion

Weighted
Multiplier

Details

Score
0-2

Notes /
Evidence



Fit to our documents

Can it handle our most used documents?



Accuracy on key fields

Is it accurate on what we care about?
Can we see the exceptions?



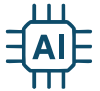
Unstructured Capabilities

Is it understanding our most complicated documents?



Speed & capacity

Can it handle large volumes at speed?



Machine Learning

Does the solution exhibit continuous learning based on past corrections?



Human-in-the-loop

Can a human easily review mistakes and make changes to the model training?



Cost clarity

Is it outcome-based? Token-based?
Usage-based? Are we okay with that?



Deployment

Can we choose where it runs based on our security and compliance needs?



Auditability

Can we control how the model is trained, monitor changes, and see how our data is used?



External users

Can external users submit documents and are they notified when inputs are missing?



Integration

Does it support the necessary output formats to integrate results in our apps and databases?



Vendor focus

Does the vendor have a clear vision for the future with a product roadmap?

