SOLUTION CRITERA

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 creterion on a scale of 0-2.

0 FAIL
1 PASS
2 EXCELLS*

*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.

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 neccessary 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?	☐	