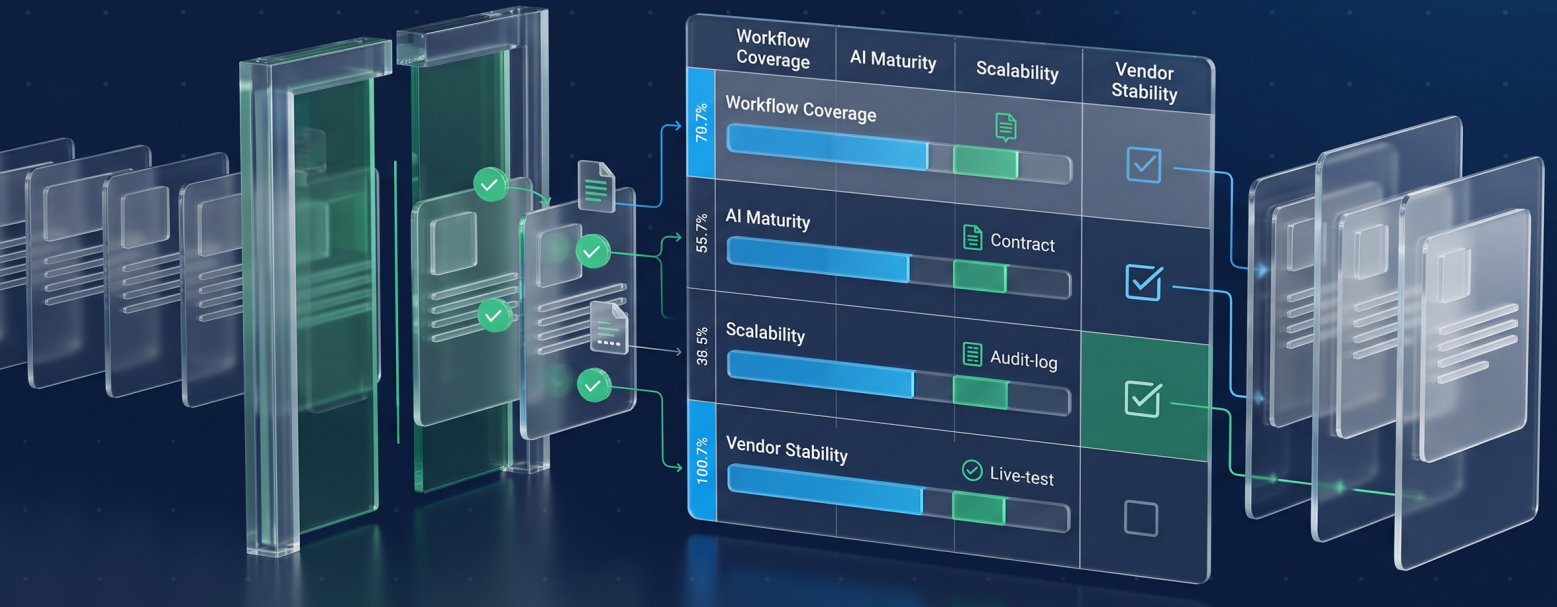




PROVIDED BY VENIO SYSTEMS

eDiscovery Vendor Scorecard

A simple, evidence-first scorecard for narrowing a long list of eDiscovery vendors down to the three worth testing properly.

2

pass-or-fail gates that remove vendors you cannot buy

12

evidence checks across four weighted categories

100 pts

weighted score, agreed before you look at any vendor

HOW TO USE THIS SCORECARD

Use this scorecard in the middle of an evaluation, when you have a long list of vendors, a few demos behind you, and nothing yet separating them. It works in four steps.

1 Gate

Check every vendor against two pass-or-fail questions in Section 02. A fail removes the vendor.

2 Weight

Agree how much each category matters in Section 03, before anyone scores a vendor.

3 Score

Collect evidence with the checks in Section 04, then score the vendors that passed in Section 05.

4 Prove

Take your top three into a hands-on test in Section 06 and score only what you saw working.

LEGEND

GATE

pass or fail, a fail removes the vendor

WEIGHTED

scored 1 to 5, counts toward 100 points



The one rule. Only score what you can prove. If you cannot name the document, call, or live session behind a score, leave it blank and test it in Section 06. A guessed score looks just as convincing as a real one once it is on the page.

01

Evaluation Details

Fill this in first, so everyone knows what the scorecard covers

Evaluation name and lead

Committee (legal, IT, operations)

Current platform and renewal date

Target decision date

Gate Check

Remove the vendors you cannot buy before you spend time scoring anyone

GATE 1

GATE

Deployment model

Ask	Can the platform run where our data must live, whether that is cloud, on-premises, hybrid, or air-gapped?
Pass if	It supports the strictest requirement we could face during the contract, not just the one we face today.
Evidence	Signed statement of work or contract wording. A sales deck does not count.

GATE 2

GATE

Pricing model

Ask	What happens to our bill if our data volume doubles halfway through the year?
Pass if	Our finance team can forecast year three from the answer.
Evidence	A written worked example at double our current volume.

#	Vendor	Gate 1	Gate 2	Moves on?
1		☐ Pass ☐ Fail	☐ Pass ☐ Fail	☐ Yes ☐ No
2		☐ Pass ☐ Fail	☐ Pass ☐ Fail	☐ Yes ☐ No
3		☐ Pass ☐ Fail	☐ Pass ☐ Fail	☐ Yes ☐ No
4		☐ Pass ☐ Fail	☐ Pass ☐ Fail	☐ Yes ☐ No
5		☐ Pass ☐ Fail	☐ Pass ☐ Fail	☐ Yes ☐ No
6		☐ Pass ☐ Fail	☐ Pass ☐ Fail	☐ Yes ☐ No
7		☐ Pass ☐ Fail	☐ Pass ☐ Fail	☐ Yes ☐ No
8		☐ Pass ☐ Fail	☐ Pass ☐ Fail	☐ Yes ☐ No

A fail is final. A vendor that fails either gate is out, however good the demo looked. Add rows if your long list is longer.

Set Your Weights

Agree how much each category matters before anyone scores a vendor

Start with the suggested weights, then adjust them to match your matters. Keep the total at 100, and do not change the weights once scoring has started. Weights changed after scoring are just a way of arguing for a favourite. Comparing self-service and full-service options? Use the same weights for both.

Category	What it covers	Suggested	Your weight
Workflow coverage	How much of the eDiscovery lifecycle runs in one platform, and how easily data moves in and out	25%	
AI maturity	What AI is included, where it runs, and how its decisions are recorded	25%	
Scalability	Processing speed, managing many matters, and what happens as volumes grow	25%	
Vendor stability	Ownership, roadmap, support, and what real customers say	25%	
Total	Must add up to 100	100%	100%



Why lock weights in advance? Pre-agreed weights force cross-functional consensus between Legal, IT, and Procurement. When criteria are fixed before demos, evaluation bias is eliminated and internal approvals move 3x faster.

Weights agreed by

Legal, IT and security, operations

Date agreed

Evidence Checks

Twelve checks, three per category, each backed by verifiable evidence



Ask each vendor that passed the gates to answer these in writing. Tick a box only when the evidence is in hand.

4.1 Workflow Coverage

The fewer systems your data passes through, the fewer places things break.

- ☐ **How much of the lifecycle runs in one unified platform?**
Evidence: One matter shown end to end in a single live session.
- ☐ **How many handoffs between systems happen along the way?**
Evidence: Handoffs counted out loud during that same session.
- ☐ **How does data move in today, and how does it leave at contract end?**
Evidence: Test import of workspace export, plus exit terms in writing.

4.3 Scalability

Every platform is fast in a canned demo. Get numbers you can enforce.

- ☐ **What processing speed can we expect on our specific data types?**
Evidence: Measured benchmark on a realistic sample of your data.
- ☐ **How are multiple matters managed across teams and templates?**
Evidence: Live walkthrough of multi-tenant administrative console.
- ☐ **What changes if our data volume grows 10x over three years?**
Evidence: Written response detailing performance and infrastructure cost.

4.2 AI Maturity

Separate included baseline AI from tools billed per token or per gigabyte.

- ☐ **Which AI features are in the subscription vs. billed per use?**
Evidence: Pricing schedule that lists every single AI line item.
- ☐ **Do the AI features run inside our required deployment model?**
Evidence: SOW confirming AI operates in on-prem/cloud/hybrid.
- ☐ **How are AI-assisted decisions audited and defended in court?**
Evidence: Sample defensibility audit log exported from platform.

4.4 Vendor Stability

You are choosing a partner for years, not a temporary feature checklist.

- ☐ **Who owns the company, and how reliable is roadmap delivery?**
Evidence: Ownership structure and last 18 months release history.
- ☐ **What does support include, and what are the SLA response times?**
Evidence: Written SLA commitments and tier-1/tier-2 escalation terms.
- ☐ **What do customers say when the vendor did not pick them?**
Evidence: Two blind reference calls with comparable matter profiles.

05

Score the Vendors

Score each category from 1 to 5 for every vendor that passed the gates

1

Poor

2

Weak

3

Meets our needs

4

Strong

5

Excellent, seen live

No evidence yet? Leave the cell blank and add it to your test in Section 06.

Category	Weight	Vendor A	Vendor B	Vendor C	Vendor D	Vendor E
Vendor name						
Workflow coverage	____ %					
AI maturity	____ %					
Scalability	____ %					
Vendor stability	____ %					
Weighted total (out of 100)						
Evidence checks on file (out of 12)						
Rank						



How to calculate. For each category, divide the score by 5 and multiply by the weight. Add the four results to get a total out of 100.

Example. A score of 4 in a category weighted 25% gives $4 \div 5 \times 25 = 20$ points.

Read the two numbers together. A vendor with the highest total but only a few evidence checks on file is not finished yet. Test the gaps in Section 06 before you rank it above a better-evidenced rival.

Proof of Concept

Take your top three. Same data, same script, scored on what you watched

Run each test with every finalist, using one of your own matters or a sanitised copy. Tick a box only if you saw it working. “We can do that” and “it is on the roadmap” do not count.

Test	Finalist 1	Finalist 2	Finalist 3
<i>Finalist name</i>			
Run one matter from legal hold to production	☐ Shown live	☐ Shown live	☐ Shown live
Count the handoffs between systems	☐ Shown live	☐ Shown live	☐ Shown live
Import our current workspace export and check what survives	☐ Shown live	☐ Shown live	☐ Shown live
Show how our data leaves, in what format, and at what cost	☐ Shown live	☐ Shown live	☐ Shown live
Answer the volume-doubling question in writing	☐ Shown live	☐ Shown live	☐ Shown live
Tests shown live (out of 5)			



Split the scoring. Legal watches for defensibility, IT watches architecture and security, and operations watches administration and cost. Three people filling in one sheet avoids an argument about averages at the end.

PoC test dataset / matter reference

Testing completed by

Red Flags to Watch For

Treat any of these as a reason to pause before you shortlist a vendor

During demos and RFP discussions, certain vendor responses signal future cost overruns, integration breakdowns, or compliance risks. Review these six warning signs before finalizing rankings.

☐ **Cannot explain the bill at double volume in one sentence**

If pricing tiers, egress fees, user licenses, or token costs are evasive, expect unbudgeted invoices as matter size expands.

☐ **Score is based on sales slides, not verifiable documentation**

Roadmap promises and marketing claims do not hold up under judicial review. Require live execution or SOW language.

☐ **Category weights were modified after scoring began**

Adjusting weights post-scoring is often an attempt to justify a pre-selected vendor rather than an objective analysis.

☐ **Demo operated exclusively on the vendor's sample data**

Synthetic demo files conceal real-world processing bottlenecks with proprietary file formats, PSTs, and mobile chat exports.

☐ **No clear, documented export path when the contract ends**

Data lock-in and steep extraction charges turn vendor transitions into expensive, high-risk migration hurdles.

☐ **Every customer reference was curated and pre-briefed by vendor**

Ask peer networks or request references with specific matter volumes closed within the last twelve months.



Remediation rule: If a finalist triggers any red flag above, require written executive clarification or disqualify before advancing to contract negotiation.

08

Decision Record

Write down what you chose and why, so the decision holds up later

Selected vendor

.....

Why, in one sentence

The reason you would give procurement if the cheapest quote did not win

.....

Runner-up

.....

Approved by

Legal, IT and security, operations

.....

Decision date

.....

Days before current
renewal

*Deciding early protects your
negotiating position*

.....

BEFORE YOU SHORTLIST

See how Venio scores on your scorecard

Bring this scorecard to a live session. We will fill in our column using your workflow, answer the volume-doubling question in writing, and let you score what you actually watched.

[Book a Venio Demo](#) →

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