

Document Management RFP Checklist

Use this checklist when building an RFP or evaluating proposals from document management vendors. It's organized by category so you can score each vendor consistently.



Company Background and Stability

- ☐ How long has the company been in business?
- ☐ How many active customers do they support?
- ☐ Can they provide references from companies of similar size or industry?
- ☐ What is their customer retention or renewal rate?

Implementation and Onboarding

- ☐ What is the typical implementation timeline?
- ☐ Is there a dedicated implementation team or project manager?
- ☐ What does the customer need to provide during setup?
- ☐ Is training included, and in what format?

Intelligent Capture and Data Entry

- ☐ Does the platform include OCR or intelligent capture technology?
- ☐ What is the typical data extraction accuracy rate?
- ☐ Can the system handle both printed and handwritten documents?
- ☐ Is mobile capture available for field based teams?

Core Document Management Functionality

- ☐ Does the platform support version control and audit trails?
- ☐ Can documents be organized and searched by metadata?
- ☐ What are the document storage limits, if any?
- ☐ Is eSignature functionality included or a separate add on?

Workflow and Process Automation

- ☐ Can approval workflows be configured without custom development?
- ☐ Can workflows be modified in house as business needs change?
- ☐ Does the platform support conditional routing based on business rules?



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Integrations

- Which ERP, accounting, or line of business systems integrate out of the box?
- Is a REST API available for custom integrations?
- What is the typical timeline and cost for a custom integration?

Support and Training

- What support channels are available, and what are the response time commitments?
- Is support included in the base price or billed separately?
- Is ongoing training available as our team grows or changes?

Scalability and Roadmap

- How does the platform perform as document volume grows significantly?
- What new features or capabilities are on the near term roadmap?
- Can the platform support additional departments or use cases beyond the initial rollout?

Security and Compliance

- What security certifications does the platform hold (SOC 2, etc.)?
- Is data encrypted at rest and in transit?
- Does the platform support HIPAA, GDPR, or other relevant compliance requirements?
- Who has access to customer data, and how is that access controlled?

Contract and Commercial Terms

- What is included in the base price versus sold as an add on?
- How does pricing scale with document volume or user count?
- What is the contract length and cancellation policy?
- Are there fees for data export if we ever need to leave the platform?

Ready to see how Symphony scores against this checklist? [Schedule a Demo](#)

