

WORKSHEET



Better Impact

Thanks for downloading this worksheet.

How to use:



1

Use this worksheet to help you and your team prepare a plan that will guide you along a successful journey to finding the volunteer management software (VMS) solution that's the best fit for your organization.

2

Use the fields to enter your information. They can be saved and modified at anytime. Take breaks, drink water!

3

To help you fill in the worksheet, refer to our detailed "Buyer's Guide" to provide you with more insights: [Buyer's Guide](#).

WORKSHEET

YOUR ROADMAP TO CHOOSING A VMS SOLUTION WITH CONFIDENCE

Problem Statement & Goal

THE PROBLEMS

WHO IT AFFECTS

THE CONSEQUENCES

Problem Statement:

The **problem**(s) is (are)

These problems affect these **people**/depts:

The **consequences** should these problems persist include:

The **proposed solution** is for Leadership to grant permission to form a project team to explore volunteer management software solutions to help solve these problems.

Goal:

Project Team

NAME

JOB TITLE

PURPOSE FOR INVOLVEMENT (PROJECT ROLE)

Vendor Profile & Needs Assessment

VENDOR PROFILE

V1

V2

V3

V4

V5

ADDITIONAL QUESTIONS

NEED

PRIORITY (M.S.N)

V1

V2

V3

V4

V5

Project Timeline & Task Assignment

	TASKS	ASSIGNMENT
MONTH		

	TASKS	ASSIGNMENT
MONTH		

	TASKS	ASSIGNMENT
MONTH		

	TASKS	ASSIGNMENT
MONTH		

Ready, Set, Go... Shortlist & Select!

Vendor Review & Shortlisting #1

NAME OF VENDOR / PRODUCT NAME

QUALIFIED | DISQUALIFIED

REASONS FOR DISQUALIFICATION

Vendor Review & Shortlisting #2

NAME OF VENDOR / PRODUCT NAME

QUALIFIED | DISQUALIFIED

REASONS FOR DISQUALIFICATION

Vendor Review & Selection

NAME OF VENDOR / PRODUCT NAME

QUALIFIED | DISQUALIFIED

REASONS FOR DISQUALIFICATION

FINAL NOTES: