

# The Pre-Decision Checklist

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Close the gaps with this checklist designed to help you close the last gate before you commit budget.

Work through every section relevant to your evaluation.

Check each box you can honestly confirm is complete.

Count unchecked boxes by section and find out what your answers tell you in the guidance section.



## PRE-DECISION CHECKLIST

### COMPLIANCE & SECURITY

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- Zero data retention requirements documented and shared with every vendor under evaluation
- Data residency requirements reviewed with legal, not with the vendor's sales team
- Security certifications reviewed for each vendor under evaluation
- Applicable regulatory requirements (GDPR, HIPAA, FINRA) mapped explicitly to vendor capabilities, with gaps documented

### QUALITY & ACCURACY

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- All required language pairs tested, not just the ones the vendor chose to demo
- Complex language pairs including Japanese, Korean, and Arabic tested against real interactions from your queue
- Actual product glossary loaded and tested for accuracy and consistency
- Quality measurement methodology agreed and documented before deployment
- Edge cases tested: technical terminology, emotionally charged language, long-form interactions, abusive content

### LINGUISTICS EXPERTISE & SUPPORT

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- Each vendor asked directly: when something goes wrong in a language our team does not speak, what is your diagnostic process?
- Responsibility for identifying and fixing quality degradation in complex language pairs documented and assigned
- Vendor support model confirmed to include linguistic expertise, not just technical support

### WORKFLOW & ADOPTION

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- Integration reviewed inside the Salesforce Service Cloud agent console, not a standalone demo environment
- Solution requires no context-switching outside the console agents already use
- Handle time baseline established with specific post-launch targets
- Agent feedback collected directly, not inferred from utilization metrics
- Adoption accountability assigned to a named person with a 90-day target

### ECONOMICS

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- 24-month TCO model built for every option under evaluation, including the option of building
- Engineering cost of the build option calculated explicitly: maintenance, prompt engineering, quality monitoring, and security review cycles
- Volume pricing and scaling terms reviewed against actual expected capacity, not current volume
- ROI baseline and targets agreed with finance stakeholders before vendor selection

### POC

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- POC used real cases from your actual queue, not a vendor-supplied dataset
- Success criteria defined and agreed before the POC started
- Real agents participated and their feedback was collected in writing
- Decision date set before the POC began and held to
- 24-month TCO model uses volume numbers from your own POC data, not vendor estimates

## PRE-DECISION CHECKLIST

### If you have unchecked boxes in COMPLIANCE & SECURITY

#### **Stop. Do not proceed to vendor selection.**

A compliance gap discovered during contract negotiation costs significantly more to resolve than one discovered during evaluation.

If your regulatory requirements disqualify options you were considering, better to know now.

### If you have unchecked boxes in WORKFLOW & ADOPTION

#### **Your ROI projection is theoretical.**

Translation infrastructure that agents work around delivers none of its projected value.

Close the workflow gaps before you finalize the business case, or build the adoption risk explicitly into your financial model.

### If you have unchecked boxes in QUALITY & ACCURACY

#### **You are evaluating on incomplete information.**

Vendor demos are optimized to avoid the failure modes your unchecked boxes would surface. Run the missing tests before you decide.

One edge case failure in a complex language pair during a POC is information. The same failure six months into a contract is a problem.

### If you have unchecked boxes in ECONOMICS

#### **You are comparing options on incomplete cost data.**

The option with the most unchecked boxes in this section is almost always the build path.

That is not a coincidence.

Require the same honest accounting from every option before you decide.

### If you have unchecked boxes in LINGUISTICS EXPERTISE & SUPPORT

#### **Most organizations arrive here with the most gaps.**

Those unchecked boxes represent a diagnostic capability you are assuming exists somewhere in your organization or your vendor relationship.

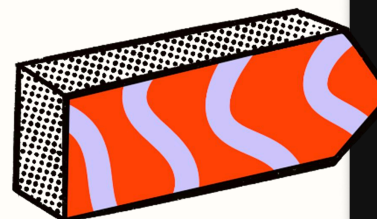
Ask the question directly before you commit. The answer will narrow your options faster than anything else on this list.

### If you have unchecked boxes in POC

#### **You are not ready to decide.**

A four-week POC with real data and a defined decision gate is the only way to remove ambiguity before you commit budget.

The cost of running it is measured in weeks. The cost of skipping it is measured in contract terms.



**If every box is checked, you have done the work. You have the information you need to make a defensible decision, close the gaps your evaluation surfaced, and walk into procurement with evidence rather than assumptions. The work is done. The decision is yours.**