

Vendor & Software Due-Diligence Workbook

Evaluate workflow fit, pilot evidence, security, privacy, data rights, integrations, total cost, contract risk, and exit readiness.

FREE PDF RESOURCE	Free to view, download, print, and use internally as a general guide.
PUBLIC FORMAT	Watermarked public edition. Editing, assembly, and extraction are disabled in compliant PDF readers.
REUSABLE WORD VERSION	Available when this resource relates to a paid EZY PZ engagement.

What this free resource includes

01 Need and ownership

02 Workflow pilot

03 Security and privacy

04 Data and integrations

05 Commercial and exit

Use the working pages to collect facts, owners, evidence, and dates. Review tax, legal, security, licensing, employment, insurance, or regulatory decisions with the qualified professional appropriate to your facts.

Work through Vendor & Software Due-Diligence Workbook

Record what is known, identify the source, assign an owner, and make missing information visible.

Need and ownership

Purpose / facts / owner / evidence / date:

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Workflow pilot

Purpose / facts / owner / evidence / date:

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Security and privacy

Purpose / facts / owner / evidence / date:

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Finish the record and confirm the next step

Complete the remaining sections, then identify what needs review, approval, secure delivery, implementation, or follow-up.

Data and integrations

Purpose / facts / owner / evidence / date:

Commercial and exit

Purpose / facts / owner / evidence / date:

Choose the support you need

FREE PDF	Free	Use this public edition as an internal reference or printed working guide.
REUSABLE WORD TEMPLATE	Included	An editable Word version is available when it supports a related paid engagement.
CUSTOM WORK	Scoped	EZY PZ can adapt, review, implement, document, or hand off the resource for your business.

Discuss a paid engagement

Call 702-421-1111 or email sales@ezypz.com and mention: Vendor & Software Due-Diligence Workbook

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