VALIDERE

EHS Software Vendor Evaluation Checklist for Energy Companies

Score requirements by demonstrated capability, evidence, dependencies, and ownership. Use with Validere's eight-question buyer guide.

How to use this worksheet: Do not score "yes/no." Record capability status, evidence, and owners. Score roadmap items separately from capabilities demonstrated in the current product.

Evaluation metadata

Vendor	
Evaluation date	
Evaluator / team	
Workflows in scope	
Sites / assets in demo	
Systems that remain authoritative	

Capability status codes

Demonstrated
Shown with a relevant workflow

Native
Current standard product

Configurable
Documented configuration

Integration-dependent
Another system required

Custom
New technical work required

Services-dependent
Vendor/partner services required

Roadmap
Planned, not available now

Unsupported
Cannot meet the need

Priority key

Must-have · Important · Optional | Site coverage: Enterprise · Region · Site · Asset

1. Workflow fit (field activity through reporting)

Requirement	Priority	Site coverage	Vendor response	Capability status	Evidence provided	Dependencies	Impl. owner	Ongoing owner	Est. effort	Risk / gap	Score
Complete workflow demo with representative data											
Steps / records / approvals outside platform identified											
Site differences, exceptions, overdue work handled											

2. Multi-site governance

Requirement	Priority	Site coverage	Vendor response	Capability status	Evidence provided	Dependencies	Impl. owner	Ongoing owner	Est. effort	Risk / gap	Score
Corporate requirements inherited across facilities											
Local admin change boundaries documented											
Approved site exceptions with documentation											
Drill from aggregate results to site records											
Historical configuration preserved when standards change											

3. Field, contractor, and operations participation

Requirement	Priority	Site coverage	Vendor response	Capability status	Evidence provided	Dependencies	Impl. owner	Ongoing owner	Est. effort	Risk / gap	Score
Access and usability under real field conditions											
Low-connectivity / offline behavior											
Contractor access without inappropriate privileges											
Feedback and follow-up visibility after submission											

4. Connected issues, actions, and records

Requirement	Priority	Site coverage	Vendor response	Capability status	Evidence provided	Dependencies	Impl. owner	Ongoing owner	Est. effort	Risk / gap	Score
Related records viewable together											
Governed relationships (not only free-text IDs)											
Premature closure / unresolved related records prevented											
External work-order / system IDs remain linked											
Full history exportable with context											

5. Environmental and emissions data governance

Requirement	Priority	Site coverage	Vendor response	Capability status	Evidence provided	Dependencies	Impl. owner	Ongoing owner	Est. effort	Risk / gap	Score
Source data ownership and validation											
Methods, factors, units, and boundaries governed											
QA, missing data, and approvals											
Versioning and recalculation history											
Calculation logic transparent to authorized users											
Prior reporting periods reproducible											
Supported programs / methodologies (list in response)											

6. Integrations and systems of record

Requirement	Priority	Site coverage	Vendor response	Capability status	Evidence provided	Dependencies	Impl. owner	Ongoing owner	Est. effort	Risk / gap	Score
System of record defined per data type											
Transfer frequency / method documented											
Failed / incomplete transfer detection											
Production integration configured, monitored, and in scope											
Source-system identifiers / lineage preserved											

7. Traceability

Requirement	Priority	Site coverage	Vendor response	Capability status	Evidence provided	Dependencies	Impl. owner	Ongoing owner	Est. effort	Risk / gap	Score
Who / what / when / why reconstructable											
Calculation / methodology change history retained											
Post-approval corrections documented											
Historical report reproduction											
Evidence linked to obligation / result; export keeps context											

8. Implementation success measures

Requirement	Priority	Site coverage	Vendor response	Capability status	Evidence provided	Dependencies	Impl. owner	Ongoing owner	Est. effort	Risk / gap	Score
Problem statement and current baseline defined											
Phase-one outcome measures agreed											
Adoption / process owner named											
Expansion criteria defined											

Extended measures (optional tracking)

- [ ] On-time task completion
- [ ] Overdue corrective actions
- [ ] Issue-to-assignment time
- [ ] Action-to-verification time
- [ ] Reporting cycle time
- [ ] Manual handoffs
- [ ] Data exceptions
- [ ] Evidence completeness
- [ ] Unresolved high-priority findings
- [ ] Repeated findings
- [ ] User participation rates
- [ ] Integration failure rate
- [ ] Approval cycle time

- [ ] Time to reproduce a reported result
- [ ] Administrative time assembling reports

Evidence request checklist

- [ ] Live demonstration with buyer workflow
- [ ] Configured prototype or sandbox
- [ ] Relevant customer reference
- [ ] Product documentation for claimed capabilities
- [ ] Implementation scope and responsibility matrix
- [ ] Integration architecture
- [ ] Sample audit history / calculation lineage
- [ ] Security documentation
- [ ] Pricing assumptions and out-of-scope items
- [ ] Explicit current-product vs roadmap distinction

Vendor summary

Category	Score	Summary judgment
1. Workflow fit		
2. Multi-site governance		
3. Field / contractor participation		
4. Connected records		
5. Environmental / emissions governance		
6. Integrations		
7. Traceability		
8. Implementation measures		
Overall fit for phase one		

From Validere's guide: 8 Questions to Ask Before Choosing EHS Management Software for Energy
validere.com · For evaluation use. Not legal or regulatory advice.