

RESEARCH

Intermediate

30 MIN

• UPDATED 2026-09-30

Compare vendor options before an IT purchase.

Research and evaluate competing solutions against your actual requirements before committing to a purchase.

MICROSOFT 365

Word

Excel

WORKS WITH

Claude

Copilot

Business Outcome

A purchase decision backed by a real requirements comparison instead of whichever vendor made the best sales pitch.

Workflow Steps

Step 1: Write down your actual requirements first

Word

Split the list into two explicit sections, Must-Have and Nice-to-Have, and write each requirement specifically enough to score ("supports SSO via SAML," not "good security").

Finishing and saving this document before opening a single vendor's website is what keeps the comparison honest instead of quietly bending to whichever vendor you already lean toward.

Step 2: Ask Copilot to build the comparison

Copilot

Claude

Feed it your requirements list and the vendor documentation/proposals you've collected, and have it score each option.

PROMPT

Compare these three vendor proposals against our requirements list. Score each vendor on each requirement (Meets / Partially Meets / Doesn't Meet), and flag any requirement none of them fully satisfy.

Step 3: Investigate any requirement nobody meets

Excel

A gap across all vendors is worth surfacing to the requirements owner – maybe the requirement needs to flex, or maybe it's a genuine dealbreaker worth negotiating.

Step 4: Weight the requirements before declaring a winner

Excel

Not every requirement matters equally – apply weights to the must-haves before the comparison produces a final recommendation.

✓ Check the work

- Verify the scoring against the actual vendor documentation, not a marketing summary.
- Confirm requirement weights were applied before ranking vendors, not just an equal-weighted average.
- Check pricing and contract terms were compared on the same basis (term length, volume) across vendors.

Expected Outcome

A vendor comparison matrix scoring each option against your stated requirements, with a recommendation.



Want help rolling this out across your team? **Go to Liminals.Tech** 