MODLR

MODLR FP&A SOFTWARE EVALUATION KIT

MODLR's FP&A Software Evaluation Scoring Sheet

Use these evaluation criteria as a scoring framework in assessing FP&A software and vendors.

Evaluation Area	What to Assess	Assess as given in key				
		1	2	3	4	5
Strategic fit	Whether the platform supports the finance transformation strategy	○	○	○	○	○
Business fit	Whether it reflects the organisation's operating model and planning drivers	○	○	○	○	○
Finance ownership	Whether finance can manage models, reports, workflows, and changes	○	○	○	○	○
Modelling flexibility	Driver-based planning, scenarios, rolling forecasts, and dimensional modelling	○	○	○	○	○
Reporting	Management, board, operational, regulatory, and financial reporting	○	○	○	○	○
Integration	Connections to finance, workforce, sales, and operational systems	○	○	○	○	○
Governance and security	Audit trails, approvals, permissions, validation, and data protection	○	○	○	○	○
Automation	Reduction of manual data, reporting, reconciliation, and workflow tasks	○	○	○	○	○
Implementation	Time, disruption, training, resource requirements, and time to value	○	○	○	○	○
Scalability	Ability to support organisational growth and changing requirements	○	○	○	○	○
Total cost of ownership	Upfront, ongoing, expansion, support, and dependency costs	○	○	○	○	○

Assessment Key: **1:** Does not meet requirements | **2:** Significant limitations | **3:** Meets basic requirements | **4:** Strong fit | **5:** Excellent fit

How to use this sheet

Score each platform from 1 to 5 against every evaluation area, using the same evidence and weighting for all vendors. This creates a more objective comparison by showing where each platform meets requirements, where compromises exist, and which option delivers the strongest overall fit for the organisation.