

Software-house pilot scorecard

A repeatable vendor-demo and pilot worksheet for software houses and agencies.

Record what was actually demonstrated, then compare similar baseline and pilot periods. This is your evaluation record, not a Trakium-generated result.

Use demonstration data. Do not enter employee names or confidential client details. Keep completed copies in an approved location. This blank PDF is for printing, not an interactive PDF form.

Vendor / product: _____ Evaluation date: _____

1. Record the demo evidence (requirements 1-4)

1. Separate missing device data from recorded idle time.

Mark one status: Not checked / Demonstrated / Needs follow-up / Not met

Evidence shown, limitation or follow-up:

2. Find a person, date and relevant application or website in the workday record.

Mark one status: Not checked / Demonstrated / Needs follow-up / Not met

Evidence shown, limitation or follow-up:

3. Inspect a periodic screenshot in its surrounding activity context.

Mark one status: Not checked / Demonstrated / Needs follow-up / Not met

Evidence shown, limitation or follow-up:

4. Review an alert and record a human decision rather than an automatic verdict.

Mark one status: Not checked / Demonstrated / Needs follow-up / Not met

Evidence shown, limitation or follow-up:

Complete the evidence checks

Continue the same demonstration. Leave anything not shown as Not checked; record unresolved questions explicitly.

1. Record the demo evidence (requirements 5-8)

5. Check report dates and totals against the underlying activity evidence.

Mark one status: Not checked / Demonstrated / Needs follow-up / Not met

Evidence shown, limitation or follow-up:

6. Let an employee review their own record without seeing colleagues' records.

Mark one status: Not checked / Demonstrated / Needs follow-up / Not met

Evidence shown, limitation or follow-up:

7. Confirm Windows device coverage, access roles and the agreed retention policy.

Mark one status: Not checked / Demonstrated / Needs follow-up / Not met

Evidence shown, limitation or follow-up:

8. Explain how activity evidence will be reconciled with tickets and approved billable time.

Mark one status: Not checked / Demonstrated / Needs follow-up / Not met

Evidence shown, limitation or follow-up:

Before testing with a team

Agree the purpose, work period and time zone, device coverage, employee notice, access roles, retention and route for questioning a record. Activity evidence does not replace project outcomes or approve billable time.

Compare the pilot, then decide

Agree acceptance criteria before the pilot. Compare the same roles, review scope and units, with sample sizes visible.

2. Compare the operating results

Baseline period and sample (dates, time zone, roles, employee-days):

Pilot period and sample (dates, time zone, roles, employee-days):

Measure and unit	Baseline	Pilot
Manager review time. Minutes per reviewed employee-day. Compare the same review scope and similar roles.		
Days with incomplete reporting. Affected employee-days / expected employee-days. Include the denominator; keep outage days identifiable.		
Records corrected after employee review. Corrected records / records reviewed. A correction is feedback, not proof of poor performance.		
Client-update preparation time. Minutes per update. Use the same client-update format in both periods.		

3. Agree the criteria and record the decision

Acceptance criteria agreed before the pilot

Define the required evidence, acceptable reporting gaps and review effort before testing.

Pilot decision and unresolved questions

Record the evidence, remaining gaps, responsible role and next review date. Leave undecided until reviewed.

Review reporting gaps and employee corrections alongside review time. One activity score, screenshot or empty record is not a performance verdict.