

Automation Partner Evaluation Scorecard

Category	What strong evidence looks like	Red flag	Score (1-5)	Evidence or notes
RPA and integration expertise	A working example that connects several systems using an appropriate mix of APIs, databases, events, workflow tools, and RPA	Only isolated scripts, macros, or product demonstrations		
Human-in-the-loop and exception management	Defined exception triggers, role-based routing, decision context, audit history, escalation, and safe resumption	The automation stops and employees reconstruct the case manually		
Compatibility with existing systems	A documented integration assessment that explains which systems can be retained and how each connection will work	Pressure to replace the technology stack before assessing it		
Canadian and industry-specific knowledge	Relevant examples covering privacy, data handling, language, formats, records, approvals, or sector requirements	Generic templates with no evidence of adaptation		

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Monitoring reliability and incident response	Alerts, logs, severity levels, named owners, runbooks, recovery tests, reconciliation, and service targets	Employees or customers are expected to discover failures		
Ongoing support and maintenance	Defined support hours, response targets, maintenance scope, change process, documentation, and asset ownership	No clear post-launch operating model		
TOTAL	Add the six category scores; 24-30 is strong, 18-23 requires investigation, and below 18 suggests material gaps		/30	