

Plan the review before the purchase

A practical evaluation checklist for leaders, IT teams, finance and providers.

The decision and scope

- What decision should the assessment support, and when is it needed?
- Which organisations, sites, services and assets are included?
- Which framework applies, and where is its current official source?
- Who collects evidence, reviews findings, approves investment and owns actions?

The evidence and output

- What evidence will support each finding? What is still missing or not assessed?
- How will imported asset data be reconciled and lifecycle assumptions checked?
- Can you see an example report and roadmap with explicit scope and limitations?
- Which costs are estimates, which are quotations, and what is excluded?

Onboarding and the commercial discussion

- Which collection methods or integrations are required for the agreed scope?
- What access and responsibilities will each team or provider have?
- What support, training, pricing and pilot arrangements are in the written proposal?
- How will privacy, processing and supplier questions be answered before data is connected?

Use current primary sources

For education, refer to the published DfE guidance. For Cyber Essentials, confirm the scheme version and certification scope with your assessor. This checklist is planning guidance, not legal advice or certification.

[DfE: Meeting digital and technology standards](#)

[IASME: Preview the Cyber Essentials question sets](#)

Reusable evidence and action worksheet

Print this page or use its columns in your own review document. Keep missing evidence visible.

Organisation / site: _____

Review date: _____ Decision owner: _____

Area / decision	Evidence / source / gap	Action / owner / review date

Decision / assumptions to validate: _____

[Discuss your review: asitplan.app/contact?topic=demo](#)