

Vendor Evaluation Checklist

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For attendees of taxi booking and dispatch system software demonstrations

Everything you need



When searching for the right booking and dispatch system, it's important to evaluate your key requirements and needs alongside suppliers' products and features, to ensure they align.

Take this checklist with you to each of your demonstrations with suppliers and use it to evaluate them individually. This is not an exhaustive list, but is designed to aid your search, detailing important criteria and a points system that can be added up at the end of a software demonstration.

Once added together, the scores can be compared and should provide you with an unbiased and effective approach to finding a supplier that suits you. Feel free to add your own criteria wherever you see fit.

BASIC INFORMATION

Vendor contact name

Contact telephone

Contact email

Date/time/location (of demonstration)

Vendor name

Software name

Software version (being demonstrated)

Other attendees

AGENDA ITEMS COVERED? (Y/N)

	YES	NO	Points (10/5/0)
Demo of each module	<input type="radio"/>	<input type="radio"/>	
Work through demo scripts	<input type="radio"/>	<input type="radio"/>	
Key questions			
1.	<input type="radio"/>	<input type="radio"/>	
2.	<input type="radio"/>	<input type="radio"/>	
3.	<input type="radio"/>	<input type="radio"/>	
4.	<input type="radio"/>	<input type="radio"/>	
POINTS TOTAL			

BOOKING AND DISPATCH SYSTEM MEETS MAIN REQUIRED FUNCTIONALITY / REQUIREMENTS (Y/N)

FEATURE	YES	NO	Points (10/5/0)	FEATURE	YES	NO	Points (10/5/0)
Operator booking	<input type="radio"/>	<input type="radio"/>		Automated Dispatch -combined different dispatch rules and times	<input type="radio"/>	<input type="radio"/>	
Run multiple companies and offices	<input type="radio"/>	<input type="radio"/>		Ringback and textback automatic notification to customer	<input type="radio"/>	<input type="radio"/>	
Customer & driver can call each other (presenting the company number to the customer)	<input type="radio"/>	<input type="radio"/>		Integrated E-bookings	<input type="radio"/>	<input type="radio"/>	
Configurable zones	<input type="radio"/>	<input type="radio"/>		GPS (meter) fare calculations	<input type="radio"/>	<input type="radio"/>	
Is it in the Cloud?	<input type="radio"/>	<input type="radio"/>		Automated fixed job pricing	<input type="radio"/>	<input type="radio"/>	
1. Dedicated Cloud server	<input type="radio"/>	<input type="radio"/>		Automatic driver suspension upon non- payment	<input type="radio"/>	<input type="radio"/>	
2. Backup Cloud server	<input type="radio"/>	<input type="radio"/>					
1. Pre-booking	<input type="radio"/>	<input type="radio"/>		Credit card payments via:			
2. ASAP booking	<input type="radio"/>	<input type="radio"/>					
3. Return booking	<input type="radio"/>	<input type="radio"/>		1. App	<input type="radio"/>	<input type="radio"/>	
4. Multi-passenger booking	<input type="radio"/>	<input type="radio"/>		2. Website	<input type="radio"/>	<input type="radio"/>	
5. Staged journey booking	<input type="radio"/>	<input type="radio"/>		3. Dispatch system	<input type="radio"/>	<input type="radio"/>	
Automated 'no-job' timer to reduce 'no-jobs' and 'no- shows'	<input type="radio"/>	<input type="radio"/>		Loyal customer priority booking			
Live vehicle mapping and tracking with ETA	<input type="radio"/>	<input type="radio"/>		Special requirements	<input type="radio"/>	<input type="radio"/>	
Remote installation and programming	<input type="radio"/>	<input type="radio"/>		1.	<input type="radio"/>	<input type="radio"/>	
Integration with real- time arrival flight data - sent to driver and office	<input type="radio"/>	<input type="radio"/>		2.	<input type="radio"/>	<input type="radio"/>	

OFFERS ADDITIONAL INTEGRATED SYSTEMS? (Y/N)

FEATURE	YES	NO	Points (10/5/0)	FEATURE	YES	NO	Points (10/5/0)
Driver app	<input type="radio"/>	<input type="radio"/>		Branded and integrated taxi company websites	<input type="radio"/>	<input type="radio"/>	
White label passenger app	<input type="radio"/>	<input type="radio"/>		Business Intelligence platform	<input type="radio"/>	<input type="radio"/>	
Automated phone system	<input type="radio"/>	<input type="radio"/>		Special requirements			
Corporate accounts portal	<input type="radio"/>	<input type="radio"/>		1.	<input type="radio"/>	<input type="radio"/>	
Driver payments	<input type="radio"/>	<input type="radio"/>		2.	<input type="radio"/>	<input type="radio"/>	
Delivery module	<input type="radio"/>	<input type="radio"/>		3.	<input type="radio"/>	<input type="radio"/>	
Taxi chatbot	<input type="radio"/>	<input type="radio"/>		4.	<input type="radio"/>	<input type="radio"/>	
Aggregator integrations:							
1. Minicabit	1.						
2. Cabfind	2.						
3. Addison Lee	3.						
4. City Fleet	4.						
5. First Rail	5.						
6. Holiday Extras	6.						
7. One Transport	7.						
8. Booking.com	8.						
9. Other	9.						
POINTS TOTAL				POINTS TOTAL			

PHONE SYSTEM REQUIREMENTS? (Y/N)

FEATURE	YES	NO	Points (10/5/0)	FEATURE	YES	NO	Points (10/5/0)
Automated phone system	<input type="radio"/>	<input type="radio"/>		Call recording	<input type="radio"/>	<input type="radio"/>	
IVR - bespoke to the taxi industry?	<input type="radio"/>	<input type="radio"/>		Call statistics	<input type="radio"/>	<input type="radio"/>	
Tight integration with:				1. Customisable contact centre wallboard	<input type="radio"/>	<input type="radio"/>	
1. Dispatch system	<input type="radio"/>	<input type="radio"/>		2. With real-time stats and traffic and flight feeds	<input type="radio"/>	<input type="radio"/>	
2. Passenger app	<input type="radio"/>	<input type="radio"/>					
3. E-booking	<input type="radio"/>	<input type="radio"/>		Blacklist/ whitelist phone numbers			
4. Virtual Operator	<input type="radio"/>	<input type="radio"/>					
Automated booking status updates	<input type="radio"/>	<input type="radio"/>		Home working supported	<input type="radio"/>	<input type="radio"/>	
Prioritise regular customers	<input type="radio"/>	<input type="radio"/>		Payments via IVR for:			
				1. Passengers	<input type="radio"/>	<input type="radio"/>	
				2. Drivers	<input type="radio"/>	<input type="radio"/>	
Multisite/ multi-company functionality	<input type="radio"/>	<input type="radio"/>		Special requirements			
Full IVR booking controls for:				1.	<input type="radio"/>	<input type="radio"/>	
1. Areas	<input type="radio"/>	<input type="radio"/>					
2. Customers	<input type="radio"/>	<input type="radio"/>		2.	<input type="radio"/>	<input type="radio"/>	
3. Times of day	<input type="radio"/>	<input type="radio"/>					
POINTS TOTAL				POINTS TOTAL			

DISPATCH SYSTEM INTEGRATED ACCOUNTS AND CASHIERING (Y/N)

FEATURE	YES	NO	Points (10/5/0)	FEATURE	YES	NO	Points (10/5/0)
Integrated accounts module	<input type="radio"/>	<input type="radio"/>		Account export functionality	<input type="radio"/>	<input type="radio"/>	
Driver payments	<input type="radio"/>	<input type="radio"/>		Integrated credit card payments	<input type="radio"/>	<input type="radio"/>	
Automated driver rent collection through: 1. Driver's App 2. IVR 3. In-office ATM				Automated invoicing	<input type="radio"/>	<input type="radio"/>	
				Integrated company docket system	<input type="radio"/>	<input type="radio"/>	
				Electronic signature capture as proof of journey	<input type="radio"/>	<input type="radio"/>	
Fixed driver rent option	<input type="radio"/>	<input type="radio"/>		Special requirements			
Commission based driver rent option	<input type="radio"/>	<input type="radio"/>		1.	<input type="radio"/>	<input type="radio"/>	
Corporate customer billing	<input type="radio"/>	<input type="radio"/>		2.	<input type="radio"/>	<input type="radio"/>	

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INTEGRATED MARKETING AND DRIVER COMMUNICATIONS? (Y/N)

FEATURE	YES	NO	Points (10/5/0)	FEATURE	YES	NO	Points (10/5/0)
Passenger promo codes	<input type="radio"/>	<input type="radio"/>		Passenger email and test marketing service	<input type="radio"/>	<input type="radio"/>	
Driver email campaign	<input type="radio"/>	<input type="radio"/>		Passenger Social Media management service	<input type="radio"/>	<input type="radio"/>	
Driver SMS texting campaign	<input type="radio"/>	<input type="radio"/>		Special requirements			
Pre-paid/ loyalty cards	<input type="radio"/>	<input type="radio"/>		1.	<input type="radio"/>	<input type="radio"/>	
Driver reports:							
1. Missed earnings while not working	<input type="radio"/>	<input type="radio"/>		2.	<input type="radio"/>	<input type="radio"/>	
2. Real-time driver sheets	<input type="radio"/>	<input type="radio"/>					
3. Earnings by job types	<input type="radio"/>	<input type="radio"/>					
4. Visibility of busy periods	<input type="radio"/>	<input type="radio"/>		3.	<input type="radio"/>	<input type="radio"/>	
5. Heat map of historical busy areas	<input type="radio"/>	<input type="radio"/>					
POINTS TOTAL				POINTS TOTAL			

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KEY IMPLEMENTATION AND SUPPORT QUESTIONS- COVERED? (V /N)

FEATURE	YES	NO	Points (10/5/0)	FEATURE	YES NO	Points (10/5/0)
Implementation assistance?	<input type="radio"/>	<input type="radio"/>		Email support?	<input type="radio"/> <input type="radio"/>	
Project time scales/ feasibility?	<input type="radio"/>	<input type="radio"/>		Web-based support?	<input type="radio"/> <input type="radio"/>	
Support SLA?	<input type="radio"/>	<input type="radio"/>		Is support free?	<input type="radio"/> <input type="radio"/>	
Support OLA?	<input type="radio"/>	<input type="radio"/>		Special requirements		
24/7 Customer Support?	<input type="radio"/>	<input type="radio"/>		1.	<input type="radio"/> <input type="radio"/>	
Support ticket system provided?	<input type="radio"/>	<input type="radio"/>		2.	<input type="radio"/> <input type="radio"/>	
Phone support?	<input type="radio"/>	<input type="radio"/>		3.	<input type="radio"/> <input type="radio"/>	
POINTS TOTAL				POINTS TOTAL		

MEETS KEY BUSINESS REQUIREMENTS? (Y/N)

FEATURE	YES	NO	Points (10/5/0)	FEATURE	YES	NO	Points (10/5/0)
Are outline costs within budget?	<input type="radio"/>	<input type="radio"/>		Special requirements			
Multiple purchase options?	<input type="radio"/>	<input type="radio"/>		1.	<input type="radio"/> <input type="radio"/>		
Fixed setup admin cost?	<input type="radio"/>	<input type="radio"/>		2.	<input type="radio"/> <input type="radio"/>		
Can vendors meet your project time scales?	<input type="radio"/>	<input type="radio"/>		3.	<input type="radio"/> <input type="radio"/>		
Is there an initial minimum licence purchase?	<input type="radio"/>	<input type="radio"/>		4.	<input type="radio"/> <input type="radio"/>		
Cost per licence				5.	<input type="radio"/> <input type="radio"/>		
POINTS TOTAL				POINTS TOTAL			

MEETS COMPANY CREDIBILITY REQUIREMENTS? (Y/N)

FEATURE	YES	NO	Points (10/5/0)	FEATURE	YES	NO	Points (10/5/0)
Vendor industry experience - years				Is the company solvent?	<input type="radio"/>	<input type="radio"/>	
Is this solution tailored to the industry?	<input type="radio"/>	<input type="radio"/>		Legal and regulatory compliance checks?	<input type="radio"/>	<input type="radio"/>	
How many customers use the system?				Information security checks - PCI compliant?	<input type="radio"/>	<input type="radio"/>	
How many vehicles use the system?				Special requirements			
Is this a start-up?	<input type="radio"/>	<input type="radio"/>		1.	<input type="radio"/>	<input type="radio"/>	
Customer review provided?	<input type="radio"/>	<input type="radio"/>		2.	<input type="radio"/>	<input type="radio"/>	
				3.	<input type="radio"/>	<input type="radio"/>	
POINTS TOTAL				POINTS TOTAL			

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