AREOTECH DECISION WORKSHEET

# Shopify Partner Evaluation Scorecard

A structured worksheet for comparing a freelancer, agency, internal team, or hybrid partner against the same business, creative, technical, and operational criteria.

### 1. Define the project

Document objectives, scope, dependencies, internal owners, launch conditions, and post-launch needs before evaluating providers.

### 2. Set weights first

Give each criterion a 1–5 importance weight before interviews. Use the same weights for every candidate.

### 3. Score supported evidence

Score candidates from 1–5 only after reviewing the proposed team, process, relevant work, assumptions, and exclusions.

### 4. Apply judgment

Use totals to expose trade-offs. Do not allow a mathematical score to replace reference checks, risk review, or leadership judgment.

| | |
|---|---|
| COMPANY | EVALUATION OWNER |
| PROJECT | TARGET LAUNCH WINDOW |
| PROVIDER A | PROVIDER B |
| PROVIDER C | DECISION DATE |

WEIGHTED COMPARISON

# Provider scorecard

Use whole-number weights and scores. Add a short evidence note for any 1, 2, or 5.

| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|
| Major concern | Below need | Meets need | Strong fit | Excellent evidence |

| Criterion | Weight 1–5 | Provider A Score 1–5 | Provider B Score 1–5 | Provider C Score 1–5 | Evidence / concern |
|---|---|---|---|---|---|
| **Strategy**<br>Discovery, goals, prioritization, commercial context | | | | | |
| **Creative ability**<br>Brand interpretation, UX, UI, art direction | | | | | |
| **Technical expertise**<br>Architecture, themes, custom work, integrations | | | | | |
| **Communication**<br>Access, clarity, cadence, escalation | | | | | |
| **Process**<br>Scope, milestones, decisions, change control | | | | | |
| **Quality assurance**<br>Functional, device, browser, content, launch checks | | | | | |
| **Post-launch support**<br>Stabilization, maintenance, response, optimization | | | | | |
| **Ownership**<br>Code, source files, accounts, documentation, access | | | | | |
| **Scalability**<br>Capacity for markets, products, features, teams | | | | | |
| **Total value**<br>Scope, quality, risk, internal effort, maintainability | | | | | |
| **Weighted total** | — | | | | Maximum depends on your weights |

**Calculation:** For each provider, multiply each score by its criterion weight, then add the ten results. Keep the underlying evidence visible; a close total should trigger deeper review, not false precision.

INTERVIEW GUIDE

# Questions and evidence

Ask every candidate the same core questions, then use follow-ups to test assumptions.

### Actual delivery team

Who will perform strategy, design, development, testing, and project management? What is each person's allocation?

### Quality assurance

Which functional, device, browser, content, accessibility, analytics, and integration checks are included?

### Outsourcing and review

Which work is outsourced or subcontracted? Who reviews it, and who remains accountable?

### Ownership and access

Who owns code, source files, domains, accounts, data, designs, and documentation at each stage?

### Scope and change control

What is included, excluded, and assumed? How are discoveries and requested changes estimated and approved?

### Launch and support

Who owns launch decisions, rollback planning, stabilization, maintenance, and urgent issue response?

### Architecture and integrations

How will requirements, data ownership, failure handling, app choices, and long-term maintainability be evaluated?

### Documentation and training

What technical, editorial, design, and operational documentation will be delivered? Who will be trained?

### Performance protection

What performance constraints are established, measured, and checked as features and third-party scripts are added?

### Future growth

How would the proposed approach support additional products, markets, content teams, functionality, or partners?

DECISION RECORD

# Compare trade-offs

Capture the reasoning behind the decision so expectations remain clear during delivery.

| Decision area | Provider A | Provider B | Provider C |
|---|---|---|---|
| Weighted total | | | |
| Strongest evidence | | | |
| Largest delivery risk | | | |
| Internal effort required | | | |
| Important exclusion | | | |
| Post-launch model | | | |
| Reference check status | | | |

## Before approval

- ☐ Objectives and acceptance conditions are written.
- ☐ Deliverables, exclusions, assumptions, and dependencies are clear.
- ☐ The proposed team and outsourced roles are identified.
- ☐ Ownership of code, source files, accounts, and data is explicit.
- ☐ Testing, launch, stabilization, and support are defined.
- ☐ Payment stages align with meaningful milestones.
- ☐ References and relevant work have been verified.
- ☐ Internal owner, approvers, and response times are agreed.

## Recommended provider and rationale

## Conditions, risks, or follow-up actions before contracting

**Use note:** This worksheet supports structured evaluation but does not guarantee project, commercial, technical, or conversion outcomes. Scores reflect the evaluator's judgment and the evidence available at the time. Verify claims, references, credentials, platform requirements, legal terms, security obligations, and ownership provisions with the appropriate professionals before contracting.