



Contractor Vetting Checklist

Scope & Fit	Asks thoughtful questions to understand your business model and key processes	
	Has at least 1 directly relevant projects (industry, modules, scale)	
	Clear lane of knowledge (functional/technical/PM/data) with defined edges	
Technical Depth	Can walkthrough a scenario that matches your environment/situation	
	Can names the trade-offs of two different approaches	
	Identifies data, security, and integration implications	
Delivery & Ways of Working	Explains how they structure sprints/iterations and decision logs	
	Has a plan for risk management and change control	
	Provides examples of turning around a failing workstream/project	
Human Skills	Explains complex topics plainly (e.g., to CFO/ops lead)	
	Asks thoughtful clarifying questions before proposing solutions	
	Handles pushback with evidence, not ego	
References & Proof	Happy to provide references tied to similar outcomes tied to similar outcomes	
	Can share previously used (anonymized) artifacts (e.g., config docs, test plans)	
	Transparent about gaps and how they mitigate them	



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Knowledge Transfer	Defines deliverables for docs, training, and handover	
	Commits to leaving playbooks/docs your team can run without them	
Availability and Rates	Confirms current capacity in hours per week	
	Any commitments with other projects expected?	
	Confirms hourly rate for your engagement	

The right D365 contractor should leave you with clarity in their ability to move your project forward. You want to be confident they will be reliable and available when you need them.

Use this checklist as your guide to cut through vague promises and ensure you bring in someone who can truly deliver.

Want extra peace of mind? Tap directly into our vetted D365 community of contractors we know and trust to get results.

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