FinTech
Evaluation Checklist

A PRACTICAL FRAMEWORK TO GUIDE YOUR FINTECH SYSTEM DECISION-MAKING

PHASE 01

Inventory Reality

- Document all customizations in current systems
- Calculate actual usage stats (not just licenses)
- Map current integrations and their complexity
- Identify unique business processes that differentiate your company

PHASE 02

Total Cost Analysis

- Get real pricing (not marketing estimates) for 3 years
- Factor in migration costs and timeline
- Include training and change management expenses
- Estimate productivity loss during transition

PHASE 03

Business Impact Assessment

- Identify process changes required per option
- Assess compliance and regulatory implications
- Evaluate impact on customer-facing operations
- Consider employee resistance and adoption challenges

PHASE 04

Future State Planning

- Align with broader tech strategy
- Consider planned integrations/expansions
- Review vendor roadmap and platform evolution
- Assess scalability for growth

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