

PIMS Vendor Comparison Worksheet

Compare practice management software vendors side by side, criteria by criteria.

Use this worksheet during vendor demos. Fill in a column per vendor you're evaluating so you can compare answers side by side afterward, instead of relying on memory or scattered notes.

Criteria	Vendor A	Vendor B	Vendor C
Automated communications & invoicing			
Reporting & analytics depth			
Inventory management			
Integration compatibility (payments, diagnostics, client engagement)			
Onboarding time & process			
Support hours (incl. after-hours)			
U.S.-based company / support?			
Independently owned, or PE/corporate-backed?			
Multi-user concurrent editing?			
SMS/texting: per-message fee or unlimited?			
System uptime (past 12 months)			
Embedded phone system, or separate subscription?			
Contract length & auto-renewal terms			
Data export fees if you leave			
All-in pricing (what's included vs. add-on)			

■ Red Flags to Watch For

- Auto-renewal clauses with a narrow cancellation window
- Fees to export your own data if you leave
- Multi-year lock-in with no early-exit option
- Vague or unlimited rights for the vendor to use your practice data
- Support tiers that gate basic functionality behind a paid add-on