

# Best Practices for Evaluating Prospective Vendors

Evaluating RFP responses is paramount to selecting a vendor that can not only effectively handle your ITAD program but can also grow a strong partnership with your organization. Conducting in person or virtual tours and evaluating customer portal functionality ensures transparency, operational integrity, and confidence in your choice.



## Common Red Flags in Vendor Responses

Selecting the right ITAD partner is critical to protecting your organization's data, reputation, and compliance posture. Overlooking warning signs in vendor responses can lead to security risks, hidden costs, and environmental liabilities that put your business at risk.

- **Lack of Supporting Documentation:** It is important to validate responses with evidence where applicable. This ensures full transparency on items such as SLAs, process docs, and contingency plans.
- **Vague on Data Security:** No clear details on destruction methods, certifications, or audit trails.
- **Compliance or Certification Gaps:** Missing or outdated certifications (R2v3, e-Stewards, NAID AAA, ISO).
- **Greenwashing Claims:** Broad "responsible recycling" promises without proof or downstream transparency.
- **Hidden or Unclear Costs:** No transparency on fees, resale revenue, or logistics charges.
- **Evasive Communication:** Generic responses, delays, refusal to provide references, or inability to conduct in-person or virtual site visits.

### Quick Tip

*Effectively manage and document RFP responses by ensuring you note Red & Green Flags. Highlight risks and strengths in each response to streamline discussions and shortlisting.*



## Customer Portal Demo Content

A live or recorded portal demo helps reveal how user-friendly, customizable, and transparent a vendor's platform truly is. Portals are essential for streamlining reporting, tracking assets, and ensuring real-time visibility across your ITAD program.

### What to look for in a Customer Portal demo:

- **Real-Time Asset Tracking**
- **Reporting Tools, Dashboards, and Certificates of Destruction**
- **Pickup Scheduling**
- **Intuitive Workflow**
- **Customization Options**
- **API Integration Capabilities**
- **Various User Roles & Permission Options**



## Benefits of an in-person or virtual tour

An in-person tour or a well-structured virtual tour is a valuable way to validate that a vendor's processes align with their RFP response. Both options offer transparency and provide decision-makers with confidence in the vendor's day-to-day operations.

- **See Security in Action:** Validate data destruction processes, access controls, and chain-of-custody measures firsthand.
- **Verify Compliance:** Confirm that certifications are backed by real, on-site practices.
- **Assess Transparency:** Gauge whether the vendor is open and forthcoming, or reluctant to show key operations.
- **Evaluate Scale & Capabilities:** Ensure the facility can handle your organization's volume, asset types, and service requirements.
- **Team & Cultural Alignment:** Ensure your company values match your prospective vendor and build confidence by engaging with the people managing your assets.
- **Identify Red Flags Early:** Operational gaps, unsafe practices, or poor data security standards.
- **Experience the Full Process Flow:** Observe the journey, from asset intake to final disposition, to assess process control and consistency.