PIVE Framework: Vendor Comparison Step-by-step guide to using the workbook

This workbook is a practical tool for implementing the Public Information Vendor Evaluation (PIVE) framework. It will guide you through a structured process to quantitatively compare up to five software vendors using only publicly available data.[1] The goal is to create a defensible, objective, and transparent comparison that aligns with your business priorities.[1]

How to Use This Workbook:

1. **Identify Vendors:** In Section 1, list the vendors you wish to evaluate.
2. **Collect Data & Score:** Proceed through Sections 2 and 3, collecting the specified public data for each vendor and assigning a raw score from 1 (Poor) to 5 (Excellent) for each of the seven metrics.[3]
3. **Assign Weights:** In Section 4, assign a weight to each metric based on its importance to your organization. This step is critical for tailoring the evaluation to your specific needs.[4]
4. **Calculate Final Scores:** The workbook will guide you to calculate the final weighted scores for "Execution Capability" and "Strategic Positioning."
5. **Estimate TCO:** In Section 5, estimate the Total Cost of Ownership for your shortlisted vendors to add financial context.[6]
6. **Visualize & Decide:** Use the final scores from Section 4 to plot each vendor on the PIVE Quadrant described in Section 6. Combine this visualization with your TCO analysis to make a final, informed decision.[7]

Section 1: Vendor Identification

List the names of the up to five vendors you will be comparing in this analysis.[7]

Vendor Name
Vendor 1:
Vendor 2:
Vendor 3:

Vendor 4:
Vendor 5:

Section 2: Execution Capability Scorecard

This section quantifies each vendor's current ability to deliver on its promises. For each metric, gather the required data and assign a holistic score from 1 (Poor) to 5 (Excellent).

2.1 Metric: Financial Viability & Corporate Stability

Data Point	Public Data Source(s)	Vendor 1	Vendor 2	Vendor 3	Vendor 4	Vendor 5
Current Ratio	10-K/10-Q (Balance Sheet)					
Debt-to-Equity Ratio	10-K/10-Q (Balance Sheet)					
Net Profit Margin	10-K/10-Q (Income Stmt)					
Revenue Growth (YoY)	10-K/10-Q (Income Stmt)					
Cash Flow	10-K/10-Q (Cash					

Data Point	Public Data Source(s)	Vendor 1	Vendor 2	Vendor 3	Vendor 4	Vendor 5
from Ops	Flow Stmt)					
Funding History (Private Co.)	Crunchbase					
Employee Growth (Private Co.)	LinkedIn					
Raw Score (1-5)	**Assign a holistic score**					

2.2 Metric: Product Maturity & Performance

Data Point	Public Data Source(s)	Vendor 1	Vendor 2	Vendor 3	Vendor 4	Vendor 5
Overall Satisfaction Rating	G2, Capterra, TrustRadius					
"Meets Requirements" Score	G2, Capterra, TrustRadius					
Total Volume of Recent Reviews	G2, Capterra, TrustRadius					
Raw	**Assign a**					

Score (1–5)	**holistic score**					

2.3 Metric: Customer Experience & Support

Data Point	Public Data Source(s)	Vendor 1	Vendor 2	Vendor 3	Vendor 4	Vendor 5
"Quality of Support" Rating	G2, Capterra, TrustRadius					
Sentiment of Support-Related Comments	G2, Capterra, TrustRadius					
Raw Score (1–5)	**Assign a holistic score**					

2.4 Metric: Security & Compliance Posture

Data Point	Public Data Source(s)	Vendor 1	Vendor 2	Vendor 3	Vendor 4	Vendor 5
SOC 2 Type II Attestation	Vendor Trust/Security Page					
ISO 27001 Certificat	Vendor Trust/Security					

ion	Page					
FedRAMP / StateRAMP	FedRAMP Marketplace					
HIPAA / PCI-DSS (if relevant)	Vendor Trust/Security Page					
Third-Party Security Rating (e.g., A-F)	SecurityScorecard, BitSight					
Raw Score (1-5)	**Assign a holistic score**					

Section 3: Strategic Positioning Scorecard

This section evaluates each vendor's potential for future success and relevance. For each metric, gather the required data and assign a holistic score from 1 (Poor) to 5 (Excellent).

3.1 Metric: Market Presence & Momentum

Data Point	Public Data Source(s)	Vendor 1	Vendor 2	Vendor 3	Vendor 4	Vendor 5
Employee Count Growth	LinkedIn					

Data Point	Public Data Source(s)					
(YoY)						
Website Traffic & Growth	Similarweb					
Social Media Audience & Engagement	LinkedIn					
Analyst Recognition (e.g., "Leader")	Gartner, Forrester Summaries					
Raw Score (1-5)	**Assign a holistic score**					

3.2 Metric: Product Vision & Roadmap

Data Point	Public Data Source(s)	Vendor 1	Vendor 2	Vendor 3	Vendor 4	Vendor 5
Roadmap Clarity & Accessibility	Vendor Website, Blog, Press					
Outcome-Orientation (vs. Feature List)	Vendor Website, Blog, Press					

Alignment with Market Trends (e.g., AI)	Vendor Website, Blog, Press					
Evidence of Customer Input	Public Feedback Portal (e.g., Canny)					
Raw Score (1-5)	**Assign a holistic score**					

3.3 Metric: Ecosystem & Integration

Data Point	Public Data Source(s)	Vendor 1	Vendor 2	Vendor 3	Vendor 4	Vendor 5
Number of Pre-built Integrations	Vendor App Marketplace					
Quality of Public API Documentation	Vendor Developer Portal					
Strategic Technology Alliances	Vendor Partner Page, Press					

Raw Score (1-5)	Assign a holistic score					

Section 4: PIVE Master Scorecard

This is where you synthesize your findings. First, assign a weight to each metric based on your organization's priorities.[5] The weights for each of the two categories must sum to 100%. The sheet will then calculate the weighted scores and final totals for each vendor.

Formula: Weighted Score = Raw Score × (Weight % / 100)

Category	Metric	Weight (%)	V1 Raw Score	V1 Weighted	V2 Raw Score	V2 Weighted	V3 Raw Score	V3 Weighted	V4 Raw Score	V4 Weighted	V5 Raw Score	V5 Weighted
Execution Capability	Financial Viability											
	Product Maturity											
	Customer											

	Experience										
	Security & Compliance										
EXECUTION TOTAL	**(Must sum to 100%)**										
Strategic Positioning	Market Presence										
	Product Vision										
	Ecosystem										

	& Int egr ati on										
ST RA TE GY TO TA L	(M ust su m to 10 0%)										

Section 5: Total Cost of Ownership (TCO) Estimation

Use this section to estimate the 3-year TCO for your top contenders. This provides crucial financial context that is not part of the PIVE score itself but is essential for the final decision.[9]

Formula: 3-Year TCO = (Annual Subscription Cost × 3) + Implementation Cost + Training Cost + Integration Cost

Cost Compone nt	Estimatio n Guide	Vendor 1	Vendor 2	Vendor 3	Vendor 4	Vendor 5
Annual Subscript ion Cost	From public pricing page					
Impleme ntation & Migration	Estimate: 50–150% of 1st year cost					
Training	Estimate:					

& Change Mgmt	10-20% of 1st year cost					
Integration Costs	Estimate based on complexity					
Estimated 3-Year TCO	**Sum of all costs**					

Section 6: Visualization and Decision-Making

Use the final scores from the Master Scorecard to plot each vendor on the PIVE Quadrant. This visualization provides an intuitive snapshot of the competitive landscape.[10]

- **Y-Axis:** Execution Capability Total Score
- **X-Axis:** Strategic Positioning Total Score

The PIVE Quadrant:

- **Leaders (Top Right):** High Execution, High Strategy. These vendors are generally the safest and most strategic choices.[11]
- **Challengers (Top Left):** High Execution, Low Strategy. These vendors offer strong current products but may lack a compelling future vision.[12]
- **Visionaries (Bottom Right):** Low Execution, High Strategy. These vendors are innovative but may carry higher risk in their current offerings.[12]
- **Niche Players (Bottom Left):** Low Execution, Low Strategy. These vendors may be suitable for very specific use cases but are generally higher risk for broad enterprise needs.[12]

Final Decision Process:

1. Identify the vendors that fall into your desired quadrant(s).
2. Use the TCO estimation from Section 5 as a final filter to compare the value of the top contenders.
3. Select a shortlist of 3-5 vendors for the next phase of evaluation, which may include direct engagement, demos, or RFPs.[7]

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