

Party Plan Software Buying Checklist

A vendor-neutral checklist for party plan and direct selling companies choosing a software platform. Version 1.0, October 2026.

<https://partyplansolutions.com/guides/party-plan-software-rfp-template/>

1. Before you send the RFP

- ☐ Write down 3 to 5 measurable goals and what is not working today.
- ☐ Agree on who decides: home office, field leaders, finance, IT, compliance.
- ☐ List current systems and the data you must migrate, with years of history.
- ☐ Mark each requirement Must, Should, or Nice. Keep Must items few.
- ☐ Set category weights in the scoring sheet before any proposal arrives.
- ☐ Pick a go-live window away from month end and your peak season.
- ☐ Send the same RFP and deadline to every vendor (3 to 5 is plenty).

2. In scripted demos and the sandbox

- ☐ Run a full party with your data: booking, guest orders, host rewards, close.
- ☐ Return a guest order after the commission run. Watch commissions and host credits adjust.
- ☐ Run your comp plan on sample data, then change one rule yourself.
- ☐ Enter an in-person order and take payment on a phone.
- ☐ Export all data from the sandbox in a standard format.
- ☐ Ask who on their team would answer a month-end commission problem.

3. Before you sign

- ☐ Get a three-year cost in writing at today's size, 2x, and 5x.
- ☐ Confirm the definition of an active consultant used for pricing.
- ☐ Check that data ownership, free full export, and data return on exit are in the contract.
- ☐ Check the exit clause, auto-renewal, notice period, and price increase cap.
- ☐ Confirm uptime SLA, credits, and month-end support are in the contract.
- ☐ Confirm you can change payout provider without changing platform.
- ☐ Call references of similar size and model, including a recent launch.
- ☐ Plan parallel commission runs before go-live.

4. Score it the same way for everyone

Score each answer 0 to 5. Multiply by priority: Must 3, Should 2, Nice 1. Weight the categories (defaults below), and compare totals out of 100 in the scoring sheet.

Category	Weight
A. Party and host management, host rewards, guest ordering	15%
B. Replicated sites and ecommerce	10%
C. Compensation plan, commissions, and payouts	20%
D. Inventory, autoshop, and mobile app	10%
E. Compliance	10%
F. Multi-country, tax, and reporting	5%
G. Technical, security, and data ownership	15%
H. Pricing and total cost	5%
I. Implementation and support	5%
J. References and contract terms	5%

5. Red flags to watch for

Comp plan lock-in. Plan rules can only be changed by the vendor, live in custom code, or cannot be exported in a readable form. Every plan change becomes a paid change request, and leaving means rebuilding the plan from scratch.

No data export. No self-serve export of all data, a fee to get your own data back, or vague contract language about who owns the data and the genealogy.

Per-distributor pricing surprises. Fees per active consultant with a loose definition of active, minimums that rise with growth, or a three-year cost that the vendor will not put in writing at two or five times your size.

Payout provider dependency. Payouts only run through one provider the vendor chose, switching providers requires a new platform, or payout fees and fund holding are not disclosed up front.

Demo without your data. The vendor will not run your comp plan or a sample party with your own data before contract signature.

Hand-picked references only. No references of similar size or model, and no client that launched recently.

Auto-renew with long notice. Multi-year auto-renewal with a long cancellation window and no price increase cap.

No SLA credits. Uptime promised in marketing but not in the contract, or month-end commission runs excluded from support.

Rule of thumb: if an answer matters to you, it should appear in the contract, not just in the proposal or the demo. A high score does not outweigh an unresolved Must item or red flag.

Companion files: Party Plan Software RFP Template (.docx and PDF) and Vendor Scoring Sheet (.xlsx), free from partyplansolutions.com. Questions: info@partyplansolutions.com.

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