

12 Questions to Ask a Contractor Management Software Vendor

One page. Put each question to the vendor, in writing where you can, and mark what you get back. Use it with the guide [What Contractor Management Software Is Good At \(and What It Can't Do for You\)](#).

Vendor and product

Asked by

Date (DD/MM/YYYY)

#	If you hear	Ask	A sound answer looks like	Mark
1	<i>'Passes every audit.'</i>	What exactly does it check, and what does it leave to us?	A list of checks (present, in date, meets your rule) and a plain statement that whether the work is safe stays with you.	☐ sound ☐ vague ☐ no
2	<i>'Fully automated approval.'</i>	Show me a contractor approved. Whose name is on the approval, and where is the reason?	A named approver and a reason on the record. The software proposes; a person approves.	☐ sound ☐ vague ☐ no
3	<i>'No human review needed.'</i>	Who or what confirms a certificate is genuine and came from the insurer or the issuer?	It reads and flags; confirming means a person, or a check against the issuer's own register. It says which.	☐ sound ☐ vague ☐ no
4	<i>'AI replaces your reviewers.'</i>	What does the AI decide, how was it tested on Australian documents, and where does a document it cannot read go?	It reads and flags against your criteria and a person approves. A test on your own past documents, results shown, and unreadable ones sent to a person.	☐ sound ☐ vague ☐ no
5	<i>'Zero risk.'</i>	What risk is left with us after we buy, and where is that written down?	A list of what stays with you (the work, the contractors, the approvals) and the contract exclusions, in writing.	☐ sound ☐ vague ☐ no
6	<i>'Fewer incidents.'</i>	Which measure, from which customers, over what period? Can I speak to one?	It names what the system changes (records, gate, reminders). Any result is dated, measured and has a method you can read.	☐ sound ☐ vague ☐ no
7	<i>'Live in days.'</i>	What do we have to supply, and how long did a business like ours take from signing to the first gate?	A list of your tasks (requirements, data load, cleaning) and a range with its dependencies, not a single date.	☐ sound ☐ vague ☐ no
8	<i>'Contractors love it.'</i>	What does a contractor have to do, step by step, and what happens when they do not?	A count of steps, what they need (phone, logins), and what your team does for the contractors who stall.	☐ sound ☐ vague ☐ no
9	<i>'Connects to everything.'</i>	Which of our systems, in which direction, with which fields, kept up by whom, at what cost?	Named integrations that exist today, what stays manual, and who pays for the build and the upkeep.	☐ sound ☐ vague ☐ no
10	<i>'One system for everything.'</i>	Which parts of our process are inside it, and which still need another tool or a person?	A clear boundary: what it holds, what it leaves out, and what you will keep running elsewhere.	☐ sound ☐ vague ☐ no
11	<i>'Your data is safe with us.'</i>	If we leave, what do we get back, in what format, how fast and at what cost?	A full export of records and history in an open format, with a stated time and no fee, written in the contract.	☐ sound ☐ vague ☐ no
12	<i>'Removes your liability.'</i>	In the contract, what do you take responsibility for, and what do you exclude?	Responsibility limited to the service. A contract cannot move a duty under the model WHS Act (ss 14 and 272), so yours and your contractors' stay put. Read the exclusions.	☐ sound ☐ vague ☐ no

How to read it. Count the answers marked sound. Any question answered with a promise instead of a record, a test or a contract term is a no. A vendor who welcomes questions 1, 3 and 12 has told you more than a demo can. Ask for what they show you in writing and keep it with your decision.

From the guide at www.complyflow.com/blog/what-contractor-management-software-can-and-cannot-do. A practical aid, not legal advice. State and territory Acts can differ from the model Act. What the business owes under work health and safety law is in the guide at www.complyflow.com/blog/pcbu-responsibilities.