

BUYER'S GUIDE

Contractor management software: 15 questions to ask every vendor.

A vendor-neutral guide for the team going to market. What to ask, why each question matters, what a good answer shows, and the one demonstration that settles it.

Current to October 2026

Checked against the model WHS laws (as at 5 December 2025) and the Privacy Act 1988, 15 October 2026

Written for

Safety, procurement, operations, IT, and finance

Includes

A demo script and a blank scorecard

START HERE

The short version.

Every contractor management system can show you a green tick. The questions in this guide find out what sits behind it: whether the person at your gate this morning is ready for the work, and whether you could prove it next year.

- 1 Approved is not ready.** A contractor company can pass every check and still send a worker whose licence lapsed last night. Ask each vendor how their system tells the two apart.
- 2 Test the chain, not the feature list.** Eight links join a contractor to your site: the company, the worker, their licences, their documents, the site and the work, access and permits, the evidence, and the status over time. A system is only as strong as its weakest link.
- 3 Make every vendor classify every answer.** Standard, Configurable, Integration, Custom development, or Roadmap. A plain yes tells you nothing.
- 4 Demand a demonstration, not slides.** One scenario, the same for every vendor, run on your own sample contractors.
- 5 Price the same volumes over 3 years,** at your size today and at double, with every cost line set out.

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01 BEFORE YOU ASK

Approved is not ready.

Most contractor checks stop at the company. The duty does not. Under the model WHS laws, a contractor's or subcontractor's employees who carry out work for your business are your workers too (section 7(1)),¹ and before any of them does high risk work that needs a licence, the business directing or allowing it must see written evidence of that licence (regulation 85).²

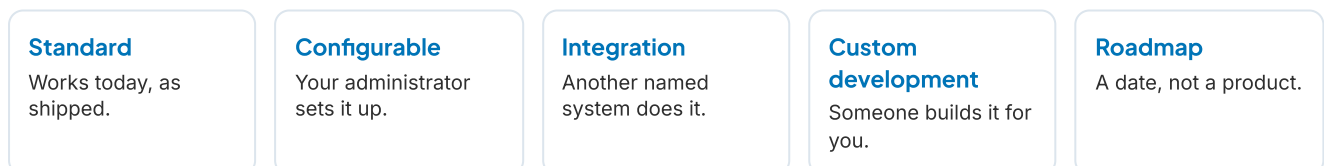
So the useful question about any system is not whether it approves contractors. It is whether it can tell you, for a named person at a named site today, that every link between them and the work holds.

The eight links between a contractor and your site.



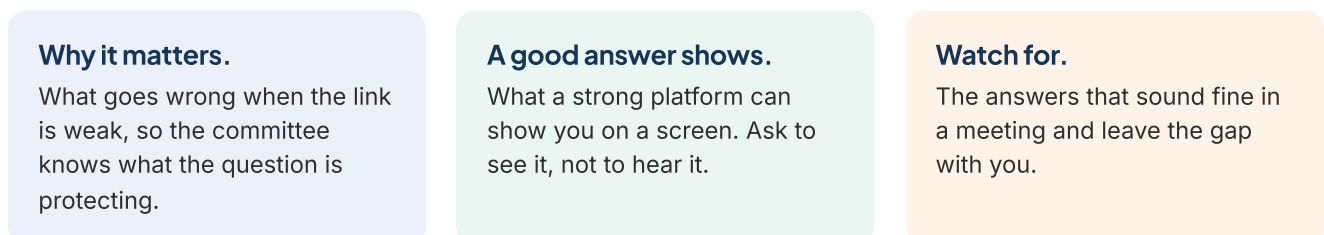
Ask every vendor to classify every answer.

A response that says yes to everything cannot be scored. Put this column next to every question and ask vendors to leave it blank where a capability is not offered.



Evidence, not assurances. Ask for one line of evidence per answer: a screen in the demo, a help article, or a contract clause. Then score what you saw, not what you were told. The scorecard on page 9 has a column for it.

How each question is set out.



02 QUESTIONS 1 TO 4

The contractor and the worker.

The company is where most checks start and stop. The people it sends to your site are what these four questions are about.

1

LINK 2: WORKER

Does the system hold the contractor company and each worker as separate records, linked to each other and to your sites?

If company approval is treated as worker approval, the people standing on your site are the ones nobody has looked at. A business approved last year says little about the six people it sends on Monday.

A good answer shows

One record per worker, linked to their company and to every site, with today's status. A worker can be ready for one site and not for another.

Watch for

One status for a company and all its people. A list of names attached to the company record.

2

LINK 1: CONTRACTOR COMPANY

How does it check that a business is real, insured, and able to do the work?

Anyone can be approved by sending a PDF. A cancelled ABN or a lapsed policy is usually found after something goes wrong, not before the contractor starts.

A good answer shows

The ABN checked against the Australian Business Register for active status, entity name, and GST registration.⁵ Each insurance certificate holding its policy period and cover, and a named person approving.

Watch for

A check of the ABN's format and nothing more. Certificates stored as files, with no dates held against them.

3

LINKS 1 AND 2: COMPANY AND WORKER

Can it manage subcontractors and labour hire, where the person on site is employed by someone other than the business you engaged?

The chain is rarely one link long. A head contractor brings subcontractors, and a labour hire provider supplies people who work in your business. Under the model WHS Act, a labour hire company's employee assigned to work in your business is your worker as well (section 7(1)).¹

A good answer shows

Each worker tied to the business that employs them and to the one you engaged, with your requirements reaching every tier you set them for.

Watch for

One level of contractor only. Subcontractors managed by email, outside the system.

4

LINK 3: LICENCE AND COMPETENCY

How does it record a licence or competency, and who checked it against the issuer?

A photo of a card proves very little. The wrong class, an expired licence, and someone else's licence all look the same until something goes wrong. Under the model WHS Regulations, a business must not direct or allow high risk work that needs a licence unless it sees written evidence of the worker's licence (regulation 85).²

A good answer shows

The class, issuer, number, and expiry recorded, with who checked it against the issuer's register, when, and with what result. A fresh check as it nears expiry.

Watch for

An upload field and an expiry date, and nothing else.

03 QUESTIONS 5 TO 8

The documents and the work.

Collecting documents is not the same as checking them, and one standard is rarely right for every site.

5

LINK 4: DOCUMENTS

Who reviews each document, and is the decision kept?

A wrong certificate on file looks like proof. Six months later, the question is what was rejected, by whom, and why, and email rarely answers it.

A good answer shows

A named reviewer approving or rejecting each upload, the reason recorded, and the contractor told exactly what to fix. Rejected and superseded versions retrievable with the reviewer, date, and comment.

Watch for

"Documents are reviewed on upload", with no name attached. Reasons that live in someone's inbox.

6

LINK 4: DOCUMENTS

If AI reads documents, what does the reviewer see, and who decides?

AI can take the reading off a reviewer's desk. It cannot hold your duty. The useful question is not whether a product has AI, but where it is used, against whose criteria, and who can overrule it.

A good answer shows

The AI reading against criteria you set, showing what it read and why it flagged something, with a named person making the call. It can be switched off per document type, and every decision is logged.

Watch for

AI that approves on its own. Criteria you cannot see or change. AI as an adjective, with no mechanism behind it.

7

LINK 5: SITE AND WORK

Can requirements change by site, type of work, role, and risk, without a vendor ticket?

Every site carries different risks. If approved means approved everywhere, the site that needs more finds out the hard way.

A good answer shows

Your own administrator adding a requirement for one site or one type of work, with only the people it affects asked for more. Site inductions held per site, an expired one changing status, and a log of who changed a requirement, and when.

Watch for

Every change raised as a request to the vendor. One checklist for every site.

8

LINKS 1 AND 4: COMPANY AND DOCUMENTS

Does a contractor upload a document once for all your sites, or once for each?

Contractors who fill in the same forms again and again push back, slow down, and price the time into their rates. Every barrier between a contractor and your requirements shows up later as your onboarding queue.

A good answer shows

One contractor profile, measured against each site's own list. A two-person subcontractor registering and finishing onboarding from a phone, with support they can reach.

Watch for

A new registration for every site. Help for your staff but not for your contractors. Fees charged to contractors that are not set out before they register.

04 QUESTIONS 9 TO 12

The gate and the record.

The day something lapses, and the day someone asks for proof, test a system most.

9

LINK 8: ONGOING STATUS

What happens when a licence, certificate, or induction expires overnight?

An approval is a photograph, not a live view. If status changes only when someone remembers, a busy week is all it takes.

A good answer shows

The status changing on the expiry date with nobody acting. The worker, the contractor, and the person who has to act each told, and the change logged. A list of what still depends on a person.

Watch for

Reminders that go out while a person still changes the status by hand. A colour change on a dashboard nobody watches.

10

LINK 6: ACCESS AND PERMITS

What does the gate see, and can status stop a sign-in or a permit where you set it up that way?

Your checks and your gate can live in separate worlds. The check happened last week; the person at the gate is this morning's question.

A good answer shows

The gate, kiosk, or phone reading current status, even on poor signal. Stopping a not-ready worker as a setting you can see, overrides recorded against a name, and a plain account of what is a setting, what relies on another system, and what is custom work.

Watch for

A list printed or synced earlier. "It integrates with your access control", with no mechanism named.

11

LINK 7: EVIDENCE

Can you export the evidence yourself, for any person or site, over any date range?

When a client, an insurer, or a regulator asks who was cleared on a past date, a check you cannot show is hard to prove you made. Under the model WHS Act, an officer's due diligence includes taking reasonable steps to verify that the business's health and safety resources and processes are provided and used (section 27(5)(f)).¹

A good answer shows

One filter and one export, run by you: who approved what and when, rejected items included. Reports a client or board can receive without reshaping.

Watch for

Reports the vendor runs for you. Evidence pieced together from several systems whose dates do not agree.

12

LINK 7: EVIDENCE

Where does your people's information live, and can you take all of it with you?

The system will hold personal information about every worker. Under the Privacy Act 1988, an organisation covered by the Act holds personal information if it has possession or control of a record that contains it, and must take reasonable steps to protect it (section 6(1), APP 11).^{3,4} At exit, an incomplete export can become the reason you cannot leave.

A good answer shows

Every place the data is stored, processed, backed up, or reached from, including support staff, AI services, and subcontractors. A full export on exit in standard formats, and deletion confirmed in writing.

Watch for

"Cloud-hosted", with no country named. An export quoted as a services job.

05 QUESTIONS 13 TO 15

Living with it.

The last three decide whether the system is still working for you in year 3, and what it cost to get there.

13

CONNECTIONS

What does it connect to, and how?

Contractor data that cannot leave the system creates a new gap. Your finance, procurement, and work-order systems, your sign-in for staff, and your reporting tools all stay where they are, so the system has to work with them.

A good answer shows

For each system you name: the mechanism (a listed connector, a documented API, or a custom build), who builds it, who maintains it, and what it costs. Single sign-on, and site-based permissions for your staff. Which of permits, inspections, and incidents sit on the same contractor record, and which need another system.

Watch for

Integrations that exist only in the sales deck. A spreadsheet download described as an API.

14

DELIVERY AND SUPPORT

How long until you are live, who does the work, and who answers when something breaks?

The plan decides the timeline more than the software does. Moving your records, setting up your sites, and bringing your contractors across take your people's time as well as the vendor's, and the first contractor stuck at a gate at 6am tests the support.

A good answer shows

A written plan with named roles on both sides, your own effort estimated, and your contractor list imported with duplicate ABNs caught before anything is saved. What your administrators can change after go-live, and the support hours and time zone, for you and for your contractors.

Watch for

Every change after go-live routed back through the vendor. A plan that asks nothing of your team. Support tiers sold separately.

15

COMMERCIAL TERMS

What will it cost over 3 years, at your volumes today and at double?

The first-year price is rarely the whole cost, and two quotes built on different counting units cannot be compared. Ask every vendor to price the same volume bands and set out each line below.

A good answer shows

What is counted (sites, workers, contractors, users, or modules). Implementation, migration, and training. Each integration. Fees charged to contractors or workers, if any, and how they are set. AI features. Support. A test environment. Term, renewal, and notice. The cost of a full export on exit.

Watch for

Features from the demo that sit in a module you have not priced. Renewal terms left blank. Anything the response calls an extra.

What we recommend: delete any question that would not change your choice, and keep the rest as gates. Then send the list to every vendor a week before the demo, and ask them to answer in order. How a vendor handles the list tells you as much as the answers do.

06 THE DEMO TEST

One scenario. Every vendor. Your data.

A feature list tells you what a system has. A scenario tells you what it does on the day it matters. Give every shortlisted vendor the same one.

THE SCENARIO

The contractor company is approved. One worker's required licence expired overnight. They arrive tomorrow for a particular job at a particular site. Show us exactly what happens.

- **Send it a week ahead**, with 5 sample contractors from your own list: a sole trader, one with an expired certificate, one with a lapsed licence, one supplied by a labour hire provider, and one from another state.
- **No slides**. A note-taker records what was clicked, not what was said.
- **A vendor who asks to skip a step** has told you which question to score 0.

1 The expiry is identified.

Ask: start on the worker's record, not a report.

Good: the licence shows as expired, with the date, and nobody had to run anything.

2 The status changes.

Ask: show the worker's and the company's status side by side.

Good: the worker is not ready and the company is still approved, held apart.

3 The right people are told.

Ask: show every notification, who gets it, and when.

Good: the worker, their employer, the business you engaged, and your person who has to act, each with a message you can read.

4 The worker and the gate see it.

Ask: try to sign in as the worker, on a phone. Then show the gate side.

Good: the worker sees why and what to fix; any override asks why and records a name.

5 The evidence is kept.

Ask: show this licence's history and the sign-in record, then export it yourself.

Good: upload, approval, expiry, and any rejection with its reason, in a file you exported.

6 Access and work processes respond.

Ask: show the setting that stops a not-ready worker, and what happens to a permit or work order.

Good: the vendor names what is a setting, what is another system, and what is custom work.

7 It is put right.

Ask: renew the licence as the worker, then approve it as the reviewer. Time it. **Good:** uploaded from a phone, checked and approved with a comment, status back to ready, and the worker can sign in. **Watch for:** a step nobody can see or time. If you asked the vendor to verify documents for you, their staff doing it is the service: ask to see it, and time it.

Score each step as it happens. Use the 0 to 3 guide on page 9. Step 1 tests questions 4 and 9, step 2 question 1, step 3 questions 3 and 9, step 4 question 10, step 5 questions 5 and 11, step 6 questions 10 and 13, and step 7 questions 5 and 8. A step that cannot be shown live scores 0, whatever the slide said.

07 THE SCORECARD

Score what you saw, not what you were told.

Write each vendor's class and a score from 0 to 3 against every question. Agree the weights with your committee before the first response opens, so nobody can tune the rules to a favourite.

0 Not offered, or no answer.

1 A roadmap item or a workaround.

2 Works, and was shown on a screen.

3 Works, was shown with your own sample data, and a reference customer confirmed it.

Class: S Standard, C Configurable, I Integration, D Custom development, R Roadmap. Leave a cell blank where a vendor could not show the answer. Shaded cells take a score only.

Question, in short		Vendor A		Vendor B		Vendor C	
		Class	Score	Class	Score	Class	Score
The contractor and the worker							
1	Company and each worker held apart, and linked						
2	ABN and insurance checked, a named person approves						
3	Subcontractors and labour hire, every tier						
4	Licence class, issuer, and register check recorded						
The documents and the work							
5	Named reviewer, decision and reason kept						
6	AI shows its reasoning, and a person decides						
7	Requirements by site and work, no vendor ticket						
8	One upload for every site, onboarding from a phone						
The gate and the record							
9	Expiry changes status with nobody acting						
10	Gate reads current status, overrides named						
11	Evidence exported yourself, any person, site, or date						
12	Data locations named, full export and deletion						
Living with it							
13	Each connection's mechanism, builder, and cost						
14	Written plan, your effort, support for contractors						
15	3-year cost, today's volumes and double						
The demo test, page 8							
Demo	All 7 steps shown live, on your data						

08 RUNNING THE EVALUATION

Give each question an owner.

The choice is rarely one person's. A safety lead usually champions it, finance often signs it, and IT and procurement can each stop it. Give each owner their questions, so nobody is asked to judge rows they do not own.

Owner	What they own	Their questions
Safety lead	What counts as ready, and the people and documents rows.	1 to 6, 9, and 11
Site or operations	The gate, and how a site adds its own requirements.	7, 8, and 10
IT	The data, the connections, and sign-in.	12 and 13
Procurement	The process, the scorecard, and the delivery terms.	14 and the demo test
Finance	The commercial terms and the cost lines.	15

Short list or full RFP.

With 100 or fewer contractor companies and 5 or fewer sites, a one-page requirements list and 2 or 3 demos run from the same script can be enough. A formal RFP earns its keep when several people have to agree, when contract and data terms need a procurement process, or when you may have to show later how the choice was made. This is our judgement, not a standard.

Three moments to use the questions.

Before the demo.

Send the questions and the scenario ahead, with your volumes. Share every vendor's clarifying questions with all of them.

In the demo.

Run the scenario on your own sample contractors, and score each step as it happens, not afterwards.

At reference.

Ask the vendor's customers which of the 15 the system struggled with after go-live, and what it took to fix.

FREE TOOL

Turn these questions into your own RFP.

The RFP Builder takes about 10 minutes over 6 steps and writes a vendor-neutral RFP in 14 sections from your answers: your priority on every requirement, the RFP wording, the cost lines, the demonstration scenario, and the evaluation weights. It is free; the full document asks for your name and company email.

[Build Your RFP](https://complyflow.com/tools/rfp-builder)
complyflow.com/tools/rfp-builder



Compliance you can prove, instantly.

Every contractor, worker, site, and process. Every time.

Where we fit.

ComplyFlow is contractor management software, so you may have us on your list. We wrote these questions so that any good platform can pass them, and we expect to be asked every one of them, in the same order, with the same scenario.

Run the scenario on us.

Send us your 5 sample contractors and the 15 questions, and we will answer them in a demonstration.

[Contact Us](#)

complyflow.com/contact

Keep reading: complyflow.com/blog/contractor-management-software-requirements-and-rfp, the requirements checklist and RFP guide behind these questions.

SOURCES

Every source, with the date it was read.

1. Safe Work Australia, model Work Health and Safety Act (Bill), as at 5 December 2025: section 7 (meaning of worker) and section 27 (duty of officers). safeworkaustralia.gov.au/sites/default/files/2025-12/model-whs-bill-5_december_2025.docx Read 15 October 2026.
2. Safe Work Australia, model Work Health and Safety Regulations, as at 5 December 2025: regulation 85 (evidence of a high risk work licence). safeworkaustralia.gov.au/sites/default/files/2025-12/model-whs-regulations-5_december_2025.docx Read 15 October 2026.
3. Privacy Act 1988 (Cth), Compilation No. 104 (4 June 2026): section 6(1), definition of 'holds', and Schedule 1, Australian Privacy Principle 11. legislation.gov.au/C2004A03712/latest/text Read 15 October 2026.
4. Office of the Australian Information Commissioner, Australian Privacy Principles guidelines, Chapter 11: APP 11 Security of personal information (updated 3 October 2025). oaic.gov.au/privacy/australian-privacy-principles/australian-privacy-principles-guidelines/chapter-11-app-11-security-of-personal-information Read 15 October 2026.
5. Australian Business Register, ABN Lookup FAQs: 'What information is available on ABN Lookup?'. abr.business.gov.au/FAQ/ABNLookup Read 15 October 2026.
6. Safe Work Australia, Legislation. safeworkaustralia.gov.au/law-and-regulation/legislation Read 15 October 2026.
7. Occupational Health and Safety Regulations 2017 (Vic), version 017 (as at 29 July 2026): regulation 129. legislation.vic.gov.au/in-force/statutory-rules/occupational-health-and-safety-regulations-2017 Read 15 October 2026.

This guide is general information, not legal advice. It refers to the model Work Health and Safety Act and Regulations published by Safe Work Australia (as at 5 December 2025) and to the Privacy Act 1988, as read on the dates above. The Commonwealth and every state and territory except Victoria have made their own versions of the model WHS laws, and numbering can differ. Victoria has not adopted the model laws: it runs its own Occupational Health and Safety Act 2004 and Occupational Health and Safety Regulations 2017. Its rule on high risk work licences, for example, is regulation 129: an employer must not allow an employee to perform high risk work unless the employee holds an appropriate high risk work licence.^{6,7} For a decision about your own organisation, read the law in your jurisdiction and take legal advice.

The capability classes, the scenario, the scoring guide, and the route advice are ComplyFlow's own judgement, not an industry standard. The questions are written so that any good platform can pass them.

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