



NITRO AUTOMATE

The Document Automation Buyer's Checklist

Evaluating enterprise document automation requires balancing developer flexibility, visual workflow accessibility for business users, high-volume performance, and strict compliance.

Use **Part 1** to map your internal workload, identify bottlenecks, and build buying committee consensus.

Use **Part 2** during vendor evaluation to benchmark platform capabilities and structure productive discovery conversations.

Part 1: Readiness self-assessment

Document volume & scale

- ☐ We process 500+ documents weekly across the team.
- ☐ A single task (password protection, redaction, conversion) repeats hundreds of times a week.
- ☐ Document volume is growing faster than team headcount.
- ☐ At least one role spends most of the week handling documents manually.
- ☐ We have delayed business requests due to document capacity constraints.

Buying committee alignment

- ☐ Budget owner and ROI targets are identified.
- ☐ Developers or IT can join early conversations to scope integrations and review security.
- ☐ Legal, Compliance, or Procurement will review certifications and contract terms.
- ☐ An incumbent contract (Adobe, DocuSign, Foxit, Tungsten) is identified to displace or wind down.

Current workflow bottlenecks

- ☐ Team members manually extract PDF data into downstream systems.
- ☐ Staff manually chase signatures across multiple parties.
- ☐ Compliance or audit has flagged inconsistent document handling.
- ☐ Documents move across 3+ systems with manual hand-offs.
- ☐ We maintain custom scripts, macros, or point tools that require constant upkeep.
- ☐ Sensitive data (PII, financial records) passes through manual handling steps.

Readiness benchmark: Meeting any of the criteria above means your team is ready for a scoping conversation about automation.



Part 2: Vendor evaluation criteria

Use these criteria during vendor RFPs, technical POCs, and scoping calls to ensure candidate platforms meet enterprise technical standards.

Deployment flexibility

- High-performance REST/HTTP APIs for developer integration.
- Pre-built connectors for no-code automation platforms (Power Automate or Zapier).
- AI agent integration via Model Context Protocol (MCP) or equivalent.
- Clear developer documentation for every deployment option.
- Single document engine across all deployment paths, not stitched point products.
- Published release notes, changelogs, and technical guides.

Performance & reliability

- Published uptime SLA of 99.9% or higher.
- Proven speed benchmark: sub-150ms execution for 99% of core operations.
- Proven track record handling high-volume workloads for enterprise customers.

Security & compliance

- Certified infrastructure backed by SOC 2 Type II and ISO 27001 standards.
- Dedicated regional data residency options.
- Automated PII detection, redaction, and password protection built into the platform.
- Explicit policy confirming customer data is never used to train generative AI models.

Total cost of ownership

- Clear pricing without per-transaction volume penalties.
- Single contract consolidation for PDF operations, eSignatures, and redaction tasks.
- Included migration support to wind down legacy vendors on your timeline.

Ready to evaluate your workflows?

Reach out to review your architecture, check API compatibility, and discuss execution paths with our solution team.

[Contact us](#)