

Software Buying Checklist

Use this checklist before starting a trial or signing a subscription.

1. Define the job

- ☐ Write the main problem and who will use the tool.
- ☐ List three must-have features and separate nice-to-haves.
- ☐ Set a monthly budget, including extra users and add-ons.

2. Check the real cost

- ☐ Compare regular renewal pricing with introductory offers.
- ☐ Check usage, client, storage and automation limits.
- ☐ Include migration, training, support and payment fees.

3. Test a realistic workflow

- ☐ Complete one everyday task using your own sample data.
- ☐ Check integrations, exports and permissions.
- ☐ Ask the people using the tool to assess the trial.

4. Plan for ownership and exit

- ☐ Confirm who controls the account and billing.
- ☐ Check data export formats, cancellation and deletion options.
- ☐ Record your decision, renewal date and account owner.

Decision notes
