

The Software Evaluation Check Sheet

Seven questions to answer before you pay for any SaaS tool.

Tool _____ Plan and price _____ Date _____

1 Does it solve a real problem?

- | | |
|--|---|
| ☐ I can state the problem in one sentence | ☐ I know how often it happens and its cost |
| ☐ No tool I already have solves it well | |

2 Are the essential features on my plan?

- | | |
|---|--|
| ☐ Essential features are listed | ☐ All are included in the plan I can afford |
| ☐ Usage limits and overage charges checked | ☐ Cost of upgrading as I grow checked |

3 Does it integrate with my existing tools?

- | | |
|---|--|
| ☐ Connects to the tools I already use | ☐ The integration does what I actually need |
| ☐ Extra cost of workarounds is counted | |

4 Can I test it with a real workflow?

- | | |
|--|---|
| ☐ Completed one real task start to finish | ☐ Tested an error and the recovery |
| ☐ Noted the friction and the limits | |

5 Is it secure and reliable enough?

- | | |
|---|---|
| ☐ Access controls and two-factor login | ☐ Backups and a clear privacy policy |
| ☐ No pattern of outage or support complaints | |

6 What is the total cost of ownership?

- | | |
|--|---|
| ☐ Setup, training and add-ons are counted | ☐ Renewal price and auto-renewal checked |
| ☐ The time saved is worth the full cost | |

7 Can I leave without losing control?

- | | |
|--|--|
| ☐ My data exports in a usable format | ☐ Cancellation notice and terms are known |
| ☐ The vendor will likely support it for years | ☐ No lock-in to proprietary features |

Decision

- ☐ Buy ☐ Keep testing ☐ Reject

If it fails an essential requirement, reject it, however good the marketing looks.

Notes _____