

Software Selection Checklist

This software selection checklist is a free list of 19 checks to run before you pay for business software: the job it must do, the unit you are billed on, free-plan and trial terms, data and privacy, integrations and support, and how to cancel. Download it as a PDF or use it on this page.

By Mishal Brands Editorial · Updated Oct 20, 2026 · [How we review](#) · [Send a correction](#)

The checklist has 19 checks in six groups. Use it with the [Start Free](#) table and the [compare page](#).

How do you use the software selection checklist?

Work through it for two candidate tools side by side. Every answer should come from the vendor's official pricing page, help center or terms, so write down the link and the date you checked it.

Define the job

- ☐ Write the one task the tool must do, in a sentence.

- ☐ List who will use it and how many seats you need now and in 12 months.

- ☐ Name the tools it must connect to (email, CRM, store, calendar).

Price and billing

- ☐ Find the unit you pay for: seats, contacts, credits, tasks, minutes or projects.

- ☐ Compare the monthly price with the annual price, and note that annual prices are often shown per month but billed up front.
- ☐ Check what happens when you exceed the limit: hard stop, overage fee or forced upgrade.
- ☐ Look for required add-ons, onboarding fees or minimum terms.

Free plan or trial

- ☐ Label it: ongoing free plan, one-time free credits, limited trial or paid only.
- ☐ Check whether a card is required and whether the trial bills automatically when it ends.
- ☐ Check free-plan exclusions: watermarks, export limits, commercial-use rights and branding.

Data, privacy and security

- ☐ Find the privacy policy and any statement on training AI with your content.
- ☐ Check whether you can export your data in a standard format.
- ☐ If you have a team, check for roles, SSO and a data processing agreement.

Integrations and support

- ☐ Confirm the integrations you need are official, not third-party.
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- ☐ Check for a public API or automation connector if you may automate later.
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- ☐ Find the help center and the support channels on your plan.
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Decide and exit

- ☐ Run one real task on the free plan or trial before you pay.
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- ☐ Write down the cancellation steps and notice period.
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- ☐ Compare two options on the same checklist, then choose the one whose limits you will not hit.
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