



Software Selection Checklist

Seven steps to choose business software you can defend at renewal time. Elysian TechBridge · elysiantechbridge.com

1. Define the problem and who owns it

- ☐ Describe the problem as something you can observe (e.g. “requests lose their history when reassigned”), not as a product.
- ☐ Note where the work starts, who handles it and what information it needs.
- ☐ Name a decision owner, a process owner, and who will set up and run the system.
- ☐ Name who approves the budget and who reviews data handling and the contract.

2. Separate must-haves from preferences

- ☐ Write a pass condition for every must-have. Avoid vague words like “easy” or “secure”.
- ☐ Reject any option that fails a genuine must-have, however good its extras look.

Must-have requirement	Evidence to ask for	Pass condition

3. Ask every vendor for the same demonstration

- ☐ Send your workflow, roles and sample data before the call; ask which edition and add-ons they will show.
- ☐ Create a sample request through its normal entry point, assign it and complete the next action.
- ☐ Change a key value and check that connected systems receive the correction.
- ☐ Test a duplicate, an unavailable owner or a failed connection, and the recovery.
- ☐ Log in with a restricted account to check access, then export the finished sample.
- ☐ Mark each result: shown live · confirmed in writing · said verbally · not proven.

4. Compare the first year with the renewal year

Cost line	Year 1	Renewal
Seats × monthly price × 12		
Required add-ons and connectors		
Usage (messages, minutes, contacts, credits)		
Implementation and migration		
Internal time (hours × your hourly value)		
Total		

Write promotional prices and renewal prices on separate lines. Note tax and currency assumptions.

5. Settle access, data and support

- ☐ Where is your data stored, which other providers handle it, and who can see it?
- ☐ Show individual accounts, admin permissions, two-step sign-in, removing access and activity logs.
- ☐ How are mistakes undone, what do backups cover, and who responds to an outage?

6. Run a pilot with written pass criteria

- ☐ Agree the participants, the tasks and the failures that stop rollout *before* starting.
- ☐ Include everyday staff, not only the project sponsor.
- ☐ Record completed tasks, manual fixes and open dependencies, separately from hoped-for savings.

7. Check the written proposal and plan the exit

- ☐ The quote matches the edition you saw demonstrated, including quantities and exclusions.
- ☐ Renewal price, cancellation notice and support scope are written down.
- ☐ Export formats, attachments, history and any retrieval fee are confirmed before you import everything.

Decision record

Decision owner	
Option chosen and edition	
Why it won (must-haves met)	
Trade-offs accepted	
Year-1 cost / renewal cost	
Renewal date / cancellation notice	
Implementation owner and start date	
Review date (90 days after go-live)	

This checklist is a decision framework, not legal, tax or procurement advice, and not a test of any product. Full guide, comparisons and free planning tools: elysiantechbridge.com/guides/software-selection-checklist/ · Questions or corrections: contact@elysiantechbridge.com