

Business Tool Comparison Checklist

Use this checklist before selecting, purchasing, or renewing a business tool.

- ☐
- I defined one business task and the required result.

TASK

- ☐
- I recorded normal and high-volume use.

VOLUME

- ☐
- I separated must-haves, useful-later features, and deal-breakers.

NEEDS

- ☐
- I checked current tools and simple process alternatives.

OPTIONS

- ☐
- I created a shortlist of no more than three realistic options.

SHORTLIST

- ☐
- I compared equivalent plans using current official information.

PLANS

- ☐
- I calculated the first-year cash and operating costs.

COST

- ☐
- I recorded trial and renewal dates before entering payment details.

DATES

- ☐
- I tested one complete workflow and one realistic problem.

TEST

- ☐
- I reviewed user roles, MFA, recovery, backups, and access removal where relevant.

ACCESS

- ☐
- I checked the data involved and the applicable privacy responsibilities.

PRIVACY

- ☐
- I tested the required integrations rather than relying on logos.

CONNECT

- ☐
- I exported representative data and opened it outside the service.

EXPORT

- ☐
- I reviewed cancellation, deletion, retention, and migration conditions.

EXIT

- ☐
- I rejected any product that failed a true must-have.

GATE

- ☐
- I documented the selected plan, evidence, owner, and review date.

DECISION

Remember: Reject any tool that fails a true must-have, even when its feature list or discount looks attractive.