



CHECKLIST

FREE

TEN QUESTIONS BEFORE BUYING ANY MARKETING SOFTWARE

Software sprawl starts in the demo. One page that stops it.

Print this, take it into the demo, write the answers down, and keep them. The answers matter twice: once now, and once at renewal when nobody can remember why this was bought.

1 What problem, in one sentence, does this solve that nothing we already own solves?

If the sentence will not come, the purchase is a want, not a need.

2 Who owns it, and who will use it weekly?

Named people, not teams. Software without a named owner is a future line in a stack audit.

3 What does it replace, and will we actually cancel that?

"It replaces X" only counts when X gets cancelled. Book the cancellation before the purchase, not after.

4 What is the true first-year cost?

Licence plus setup, training, integrations and the paid tier you will actually need once the trial limits bite. The demo price is rarely the real price.

5 What data goes in, and can we get it out?

Ask for the export path and format now. Data that only exists inside a vendor's walls is a hostage.

6 What breaks if we cancel in twelve months?

The exit cost is part of the entry decision. Which processes, automations and records depend on it staying?

7

Contract term, auto-renewal, and notice window?

Write all three down. Auto-renewal with a 60-day notice window is where forgotten software becomes a two-year sentence.

8

What does integrating with our core systems actually require?

"Integrates with" covers everything from one click to a consulting project. Ask what the connection does, and who builds it.

9

Security basics: SSO or 2FA, and who administers access?

One line now saves an incident later. If the vendor squirms at this question, believe the squirm.

10

If we do nothing for six months, what does the problem cost us?

The honest baseline. Some problems are cheaper than their solutions, and finding that out in the demo is a win, not a waste of a meeting.

Two rules. The answers get filed where the renewal reminder will find them. And no purchase on demo day, ever, a decision that cannot survive 48 hours was not a decision.

When the tool joins the stack, it joins the register too. The full stack audit worksheet on the resources page is where these answers eventually earn their keep.



If you would rather have this done **with** you
than **to** you, this is the work I do.

START A CONVERSATION

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