

# Automation Software Selection Checklist 2026

AIPROCESSIA · 25 questions to ask before signing any AP, BPM, workflow or low-code contract

## 1 — Use case & ROI (first)

- I can name the 3 concrete processes I want to automate (not "automation in general").
- I have measured the current cycle time and FTE cost of each one in the last 30 days.
- I have a target ROI band and payback period agreed with the budget owner (months).
- I know what "good enough" looks like for each process (KPI + threshold, not vibes).
- I have written down what I would NOT automate this year and why.

## 2 — Vendor capability fit

- I have at least 3 shortlisted vendors, not just the one the AE called me first.
- I have a 30-minute scripted demo per vendor with MY data, not theirs.
- I have verified the AI / OCR / extraction accuracy on a 50-document sample.
- I have asked the vendor for 3 reference customers at MY size and in MY industry.
- I have searched G2 and Reddit (r/sysadmin, r/SaaS, r/automation) for criticism.
- I know which features require the next pricing tier (premium connector trap).

## 3 — Integration & compliance (the killers)

- I have seen the vendor write back into MY ERP / CRM sandbox in real time during the demo.
- I have the list (in writing) of unsupported custom fields and edge cases.
- I know whether bi-directional sync is real-time webhook or polled every N minutes.
- I have asked what happens when the destination system is down (queue vs fail).
- SOX / HIPAA / SOC 2 / ISO 27001 / GDPR / NIS2: I know which ones I need; vendor proves it.
- EU AI Act high-risk classification: I know if my use case triggers it; vendor has a plan.
- PEPPOL / MTD / VERI\*FACTU / TicketBAI: my e-invoicing scenario is covered out of the box.

## 4 — Contract & exit

- The contract gives me data export rights in a usable format (CSV / JSON / SQL dump).
- Termination notice period is documented and not punitive (90 days max for SMB).
- Per-user / per-execution / per-document pricing has explicit caps to avoid bill shock.
- There is a documented escalation SLA for support, not just "best effort".
- I have negotiated implementation cost upfront — not "estimated TBD".
- I have asked what they cannot do (the most useful question on this checklist).

### Need a custom shortlist for your stack?

Free 30-minute call · We map your top 3 processes against the 10 platforms that actually fit your situation.

[info@aiprocessia.com](mailto:info@aiprocessia.com) · WhatsApp +34 635 439 118 · <https://aiprocessia.com/en/>