

CHECKLIST

Platform selection checklist: questions to ask before you sign

Choosing a low-code or no-code platform is easy to start and hard to undo. The demos look great, the sales team is friendly, and the first app is up and running in a week. The questions that really matter tend to come up a year later: when the licence bill grows, when you hit a limit, or when you want to leave.

This checklist helps you ask those questions *before* you sign. It's vendor-neutral, and it works for any platform, including a comparison between a platform and AI-assisted development.

How to use it:

- Answer the questions in part 1 yourself, before talking to any vendor.
- Use parts 2 to 6 in conversations with vendors, and ask for evidence, not promises.
- Use part 7 to plan the demos and an optional proof of concept.
- Not every question matters equally for you. Mark the ones that do, and score platforms on those.

1. Fit: what do you actually need?

Answer these yourself, before the first demo.

- ☐ What kind of applications will you build: proofs of concept, forms and workflows, internal tools, customer-facing apps, or business-critical systems?
- ☐ Who will build them: professional developers, business users, or both?
- ☐ Who will maintain them in two years' time?
- ☐ Is a platform the right approach at all, or would AI-assisted development or traditional code fit better? (Sometimes the answer is "no platform at all".)
- ☐ Which three to five applications would you build first?

2. Functionality and limits

- ☐ Can it connect to your existing systems (your identity provider, ERP, CRM, databases), and through standard methods like REST APIs?
- ☐ How complex can the data model get before things become painful?
- ☐ Can you add your own code where the platform reaches its limits? In which language, and how?
- ☐ Does it support what your users need: mobile, offline use, accessibility, multiple languages?
- ☐ What AI features does it offer: AI-assisted building, AI in the apps themselves, building AI agents? Which models are behind them?

3. Governance and security

- ☐ Does it support single sign-on with your identity provider, and role-based access?
- ☐ Where is your data stored and processed? Can you choose the EU?
- ☐ Which certifications does the vendor have (for example ISO 27001 or SOC 2), and can you see the reports?
- ☐ Are there audit logs: who changed what, and when?
- ☐ How are backups arranged, and how quickly can you restore?
- ☐ Can IT see and manage everything citizen developers build?
- ☐ For AI features: is your data used to train the vendor's or a third party's models?

4. Cost

- ☐ What is the licence model: per user, per app, per environment, or based on usage?
- ☐ What does it cost in year one, and in year three if usage triples? Ask for both.
- ☐ Which costs come on top: extra environments, premium connectors, AI credits, support levels?
- ☐ What does training cost, and how long before your team is productive?
- ☐ How easy is it to scale down if you need less?

5. Lock-in and exit

The most important questions, and the ones asked least.

- ☐ If you leave, what can you take with you: your data, your application logic, your code?
- ☐ In which format, and can anything else run it?
- ☐ How much notice do you need to give, and what happens to your data after you leave?
- ☐ Which parts of your applications only work on this platform?
- ☐ What would it realistically take to rebuild your three most important apps elsewhere?

6. The vendor and its ecosystem

- ☐ How long has the vendor existed, and how is it financed? Is there a chance it gets acquired or stops?
- ☐ What does the roadmap look like for the next two years, especially for AI?
- ☐ Can you find developers and partners for this platform in your region?
- ☐ Is there an active user community, and good documentation?
- ☐ Can you talk to two or three reference customers similar to you, without the vendor in the room?

7. The demo and the proof of concept

- ☐ Give every vendor the **same scenario**: a real workflow or process from your own organization. Not their favorite showcase.
- ☐ Let the vendor build or adapt part of it *live*, so you see how it works, not just how it looks.
- ☐ Score each demo on the questions you marked as important.
- ☐ For the top one or two candidates, consider a short **proof of concept**: one realistic use case, built by your own people with the vendor's help.
- ☐ Write down why you chose, not just what. Future you will want to know.

Choosing well takes time, and saves much more

A good platform choice takes a few weeks. A bad one costs years. This checklist won't make the decision for you, but it makes sure you decide with your eyes open.

Would you rather not do this alone? I run independent platform selections: from requirements to a well-founded recommendation, with no commercial ties to any vendor.

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