

OKR Software Buyer's Checklist 2026

14 questions to ask before you commit — organized by category. Score each vendor 0–2 per question. Highest total wins.

FIT AND ADOPTION

#	Question	Vendor 1	Vendor 2	Vendor 3
1	Can a non-technical teammate set up an objective and complete a check-in in under 30 minutes — without help?			
2	What is the weekly active usage rate among comparable customers at day 60? (Ask for data, not logos.)			
3	How long did comparable customers take to run their first complete check-in cycle?			
4	Does it send check-in nudges natively in Slack or MS Teams — or just link back to the app?			

PRICING AND CONTRACT

#	Question	Vendor 1	Vendor 2	Vendor 3
5	Is pricing per-user or flat-rate? Are there free or cheap view-only licenses for non-editors?			
6	What is the minimum seat count and minimum annual contract value?			
7	What is the total year-one cost including implementation, onboarding, and coaching?			
8	Which features are gated — SSO, SCIM, API access, HRIS integrations, advanced dashboards?			
9	Is there a free trial or free tier? Is billing monthly or annual-only? What is the renewal-increase policy?			

DELIVERY AND VENDOR RISK

#	Question	Vendor 1	Vendor 2	Vendor 3
10	SaaS or self-hosted? Where is data stored? What is the SOC 2 and GDPR status?			
11	Which integrations are native vs Zapier? Confirm your must-haves: Slack/Teams, Jira, HRIS.			
12	Can we export all OKR and KPI data (CSV or API) at any time? What happens to our data if the vendor is acquired or sunsets?			
13	Is OKR coaching included in the subscription or a separate line item?			
14	Is a dedicated Customer Success Manager included or a separate cost?			

SCORING TABLE (0 = No / 1 = Partial / 2 = Yes)

Category	# Questions	Vendor 1	Vendor 2	Vendor 3
Fit and Adoption	4 (max 8)			
Pricing and Contract	5 (max 10)			

Delivery and Vendor Risk	5 (max 10)			
TOTAL	Max 28			

The vendor with the highest total is the right fit for your stage. For teams under 200 people, Adoption (Q1–4) should be weighted most heavily — a tool nobody uses generates 0 ROI regardless of feature depth.