

# Data & analytics vendor demo checklist

**Vendor name:** \_\_\_\_\_

## Affiliations data

Understand physician relationships with a wide variety of healthcare organizations. Ensure this information is updated frequently and includes predicted affiliation strength.

**YES**

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**NO**

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**COMMENTS**

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## Physicians and referrals data

Where are physicians sending your target patients? Is the vendor able to trace referral patterns to both in-network and out-of-network providers and help you identify sources of patient leakage as well as patient acquisition opportunities.

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## Integration

Does this vendor easily integrate with your Data Warehouse or other systems? A good data and analytics solution seamlessly integrates with your existing data infrastructure.

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## Claims coverage

Can the vendor provide adequate claims coverage for physicians and facilities in your preferred locations? How many unique patients that match your ideal patient characteristics can the vendor provide?

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## CMS and private payor claims analytics

Does the vendor provide full market coverage with both Medicare claims and private payor claims to help you get a complete view of the healthcare marketplace?

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### Ease of reporting

Does the vendor ease information access by providing a way for non-data scientists to easily produce reports that provide needed information quickly?

YES

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NO

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COMMENTS

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### Extensive executive and physician data

Can the vendor help you identify and contact the right physicians and healthcare executives to meet your staffing and recruiting needs? Does the vendor provide accurate and current physician and executive contact information?

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### Data update frequency and accuracy

Each vendor will have a variety of data sources — some proprietary and some via partnerships. Is this vendor's approach to timeliness, recency and accuracy for their data assets as robust as you need it to be?

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### Data visualization and dashboard capabilities

Working with large quantities of data can be overwhelming. Does the vendor provide the option to use easy-to-understand visualization or analytics dashboards to convey insights clearly and facilitate the sharing of insights? Take the opportunity to pressure-test various scenarios during demos.

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### Professional services

Not every organization has dedicated data science or analytics resources, but a good partner can make their expertise available when you need insights that require complex correlations, trends and other analytics. Does the vendor have a well-respected professional services organization?

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**Data packaging flexibility**

Every organization has its own unique data needs. Some databases will be more valuable than others and resources are finite. Is this vendor able to deliver a package containing the data you need?

**YES**

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**NO**

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**COMMENTS**

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**Customer success excellence**

A good data partner understands that successful clients are more likely to become strategic business partners. Does the vendor have a formal customer success organization that is dedicated to helping customers get the most value possible from their data?

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**TIP:**

**Ask about onboarding milestones to get a sense of how well this vendor has structured its approach to your success.**

**TOTAL:**

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**ADDITIONAL COMMENTS:**

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## Compare what you learned from each demo session

After your demos, you'll have several scored demo checklists. That will be helpful, but you'll have to decide with your buying team how to weight each of those capabilities. It's likely that a few capabilities emerged for you as critical needs, and a few others stood out as optional.

For example, a small organization may not have an in-house data science or analytics team. The option to request special reporting from a vendor's professional services team or a third-party data science team will be highly important to them. Some provider organizations may find that they prefer a less democratized approach to data access so they can maintain control of how data is being interpreted and utilized.

If you're struggling to prioritize the right capabilities, huddle again with your buying team. You probably haven't challenged yourselves enough to get specific about your needs.

# Take the next step

Definitive Healthcare is a data and analytics company focused on the business side of healthcare. The healthcare market is complex — our data makes it clearer. We cut through the noise to deliver the insights you need to make smarter, faster, more strategic decisions. Because when you succeed, healthcare gets better for everyone.

[Book a demo today →](#)



**Definitive Healthcare**