

Data & analytics vendor demo checklist

Vendor name: _____

Market opportunity assessments

Your goal should be to have a complete, integrated picture of your entire market ecosystem and how all the pieces fit together. How can the vendor help you achieve this goal? Are you able to access comprehensive commercial and CMS medical claims? Can they tie medical and prescription claims data to provider references and affiliations? Can they provide provider reference data, physician profiling, and expert data? Do they provide analytical tools that are intuitive and easy to use? Can they integrate into your CRM? Do they offer customizable templates so you can quickly generate reports? This is important for communication with key stakeholders.

YES

NO

COMMENTS

☐☐

Addressable provider/patient population

How does the vendor enable you to understand your addressable patient and provider population, including demographics? What insights can they uncover on clinical volume of the provider base and the breakdown in revenue from commercial insurance vs. Medicare/Medicaid? Can the vendor identify patients' related diagnoses and the procedures and prescriptions they receive? What claims data can you access? What types of patient and provider filters are used? It's important to also find out if your entire team can use this data as a single source of truth.

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KOL and expert data and insights

You need to identify and engage with the right KOL and experts to inform your messaging, generate demand for your therapeutics, and build influence. How will this vendor help you do that? How comprehensive is their expert profile data? Can they provide targeted searching and filtering? Press for details on how they enable you to evaluate spheres of influence. Can you share these insights within digital workspaces for multi-team collaboration?

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Extensive executive and title database

Once you have identified which hospitals or providers can benefit from your therapeutics, your sales team needs accurate, current, and comprehensive contact information to reach their prospects. A good healthcare data solution also has a verified executive database.

YES	NO	COMMENTS
☐	☐	

Longitudinal view into affiliations and an evolving market

Can the vendor uniquely identify every healthcare provider, facility, and organization in your market? Can they provide a comprehensive and longitudinal view into affiliations? Can they provide insight into how individual entities are connected and interact to help you make better decisions?

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Custom projects

A true vendor partnership includes a professional services team that will work with you on custom projects. Can this vendor design a comprehensive project customized to your needs? Will they customize dashboards? Are they able to create customized data extracts for your data warehouse that have been cleaned and mapped to your specific requirements? Can they provide custom claims analysis and longitudinal patient journeys to assist you in gaining a deeper understanding of your targeted healthcare organizations, providers, and patient population? Take the opportunity to test various scenarios during demos.

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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. Does this demo demonstrate an ability to package the data that you need and not charge for data you don't need?

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Customer success team support

A good data and analytics partner is committed to your long-term success. Ask the vendor how they ensure that you are getting the most from your new platform. If a prospective partner doesn't promise to check in with you regularly, then you can do better.

YES	NO	COMMENTS
☐	☐	



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:

Compare what you learned from each demo

After completing your demos, you'll have a clear view of how each vendor performs against your requirements. Revisit your priorities and separate must-haves from nice-to-haves. The right solution will depend on your organization's goals, resources, and workflows.

If you're struggling to prioritize features, bring your buying team back together and dig deeper. The more specific you can be about your needs, the easier it will be to select the solution that best supports your organization now and in the future.

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