

Data & analytics vendor demo checklist

Vendor name: _____

Technology insights

Will you have access to insights like technology implementations, purchasing opportunities, telemedicine, technology strength? The right data and analytics vendor will provide comprehensive market and account-level technology intelligence.

YES

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NO

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COMMENTS

Extensive executive and title database

Once you have identified which hospitals or providers can benefit from your product, your sales team needs accurate and current contact information to reach these prospects. A good healthcare data solution also has a verified executive database – with transparency into how current the data is.

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Affiliations data

Understand purchasing relationships, facility ownership, network integration level, and affiliated organizations and physicians to lead more impactful marketing campaigns and close more sales deals. Ensure this information is updated at a frequency that works for your business.

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Firmographic data

Having a snapshot of key characteristics of a healthcare organization can help your commercial organization prioritize the right opportunities. Inquire whether the data vendor provides a summary of intelligence like financial strength, bed size, firm type, fiscal year end, geographic location, average length of stay, and general contact information.

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Data integration

The ability to integrate data from the vendor you’re evaluating with your own internal systems and workflows is critical to boosting productivity, improving data cleanliness and maximizing the value of your internal systems. The right vendor will have a seamless data matching process and ensure the right data elements appear in the right places. They should also provide variety of delivery methods and sync data with internal systems like CRM, ERP, and data warehouses.

YES

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NO

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COMMENTS

Requests for proposals (RFPs)

Understand the market potential and segment targets based on stage of the RFP, build a contact list for email campaigns, or enable sales reps. Ask what RFP intelligence the data vendor provides.

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Data visualization capabilities

Working with large amounts of data can be overwhelming; the option to use easy-to-understand visualization makes sharing information between teams that much simpler. For example, is there a way to visualize the technology or vendor market share or conduct a competitive analysis with interactive charts, graphs, and tables?

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Claims data

Include any ICD, DRG, HCPCS/CPT codes that represent diagnoses or procedures that are important to your business.

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Data updates and verifications

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 key data as robust as you need it to be?

YES

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NO

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COMMENTS

Professional services

Not every organization has a dedicated data science team, but a good data partner can make theirs available when you need insights that require complex correlations, trends, and other analytics.

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Customized dashboards

A data and analytics platform should offer customized analytics dashboards to fit unique needs, because no two businesses are exactly alike. Take the opportunity to push and pressure-test various scenarios during demos.

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ICD-10 and CPT records

Include any codes that represent procedures and professional services that are important to your business.

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Consumer data

Access to robust consumer data—including SDoH, demographics, and claims—enables a deeper understanding of patients and communities. When evaluating vendors, prioritize those that offer high-quality, privacy-compliant data that can be connected across the healthcare ecosystem. These insights support more informed strategy, precise targeting, and improved outcomes.

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Physicians data

Does the solution encapsulate key physician background information like education and professional qualifications? Does it allow you to define whether they are an expert in their field? Take notes here on how well the demo professional describes how to use the data. (You're looking for both data and a strategic partner here, so take this opportunity to ensure they know the needs of your business).

YES

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NO

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COMMENTS

CMS and private insurer claims analytics

Medicare claims are every bit as important as private insurer claims. You need both to get the true view of a provider's expertise outside of their elected specialty.

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Extensive executive and title database

Once you have identified a target list of providers, your sales team needs accurate and current contact information to reach these prospects. A good healthcare data solution also has a verified executive database to enable conversations around corporate partnerships.

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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 show an ability to package the data that you need and not charge for data you don't need?

YES **NO**

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Customer experience & support

A good data partner sees that customer success fosters long-term partnerships. If a prospective partner doesn't have a dedicated team to not only check in regularly, but also partner with you to ensure you are getting the most from your new data platform, then you can do better.

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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:

Compare what you learned from each demo

After your demos, you'll have several scored demo checklists. There will be a number of yes's and a number of no's. 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 – if you focused on your requirements thoroughly – a few capabilities emerged for you as must-have's and a few as nice-to-have's. For example, a small organization likely will not have an in-house data science team. The option to request special reporting from a 3rd-party data science team will be highly prioritized for them. Some companies 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. While we don't recommend this method, that choice will depend on unique factors for your business. Those organizations may not be as interested in customizable dashboards or CRM integration. The list goes on. If you're struggling to prioritize a solution's 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