

40 QUESTIONS

**TO ASK DEMAND
GENERATION
VENDORS**

BEFORE YOU SIGN



Executive Summary

Stakeholder alignment ranks as the top buying complexity source for 35% of B2B buyers ([INFUSE Voice of the Buyer, 2026](#)). However, many vendor evaluations still follow seller-controlled agendas that surface curated demos instead of operational fit.

This guide covers 40 diligence questions across seven categories that expose deal-breaking gaps before contracts lock in months of pipeline recovery.

Key insights:

Verify how vendors source, validate, and refresh contact and intent data before trusting any demo

Confirm compatibility with existing customer relationship management (CRM), marketing automation platform (MAP), and analytics infrastructure

Establish contractual service level agreements (SLAs) for lead quality, delivery timelines, and replacement policies

Assess General Data Protection Regulation (GDPR), California Consumer Privacy Act (CCPA), and emerging privacy regulation adherence with documented evidence

Negotiate data portability and termination terms before signing



Read the full guide to apply a buyer-controlled 40-question framework across data, coverage, integration, compliance, support, pricing, and contract terms.

Why do vendor evaluations fail before they start?

Vendor evaluations often miss real fit when sellers set the agenda and demonstrations stay seller-curated. The operational impact extends beyond wasted budget to quarters of pipeline recovery when coverage gaps, integration limitations, or compliance exposures surface only after contract signature.

According to [Voice of the Buyer 2026](#), stakeholder alignment is the top buying complexity source for 35% of B2B buyers, with alignment friction stalling deals across NAM (33%), EMEA (36%), and APAC (38%). When evaluations fail to surface stakeholder concerns during diligence, those concerns surface during implementation, compounding the cost of poor selection.

Three patterns make seller-controlled evaluations predictable:

1

Demo agendas surface strengths while leaving capability gaps unexplored

2

Reference clients get selected for favorable outcomes rather than representative ones

3

Technical questions get deferred to post-sale implementation teams

Buyer-set question frameworks shift control back to the purchasing organization. Teams that develop standardized evaluation criteria force vendors to address specific requirements on the buyer's terms, exposing gaps before financial commitment.



How to use this vendor evaluation checklist for B2B buying decisions

A vendor evaluation checklist is a buyer-controlled scoring framework that standardizes comparison across competing solutions.

The checklist organizes 40 questions across seven categories:



**Data
quality**



**Coverage
accuracy**



**Integration
capabilities**



**Compliance
readiness**



**Support
structure**



**Pricing
transparency**



**Contract
flexibility**

Each category maps to a different internal review:

Data and coverage involve RevOps and marketing analytics

Compliance requires legal and security

Integration routes through technical leadership

Pricing and contract belong with procurement and finance

Running the full checklist requires coordinating input from a buying group that averages nine people in typical B2B technology purchases ([INFUSE Voice of the Buyer, 2026](#)).

PRIORITIZE CATEGORIES BY USE CASE

Step 1

B2B buyers consume nine content pieces during vendor evaluation on average ([INFUSE Voice of the Buyer, 2026](#)), so evaluation fatigue is a documented pattern. Rather than completing all 40 questions sequentially, teams should rank the seven categories by relevance to their specific requirements, enabling focused assessment that reduces evaluation fatigue.

REQUIRE WRITTEN VENDOR RESPONSES

Step 2

Verbal assurances during sales calls lack accountability. Distribute questions in advance and mandate documented answers, creating an auditable record that stakeholders can reference throughout the decision and during post-implementation reviews.

ESTABLISH A 1-5 SCORING RUBRIC

Step 3

Assign numerical values to each response: 5 for comprehensive evidence, 3 for partial documentation, 1 for vague or incomplete answers. This quantification enables objective comparison across vendors.

APPLY AUTOMATIC DEDUCTIONS FOR DEFLECTION

Step 4

Vague responses or deferred answers should trigger point reductions. Silence on compliance certifications, integration limitations, or contract terms signals risk that warrants disqualification. Stakeholder alignment during complex purchases relies on the same structured-evaluation discipline that drives [modern content activation](#).

AGGREGATE SCORES BY CATEGORY

Step 5

Calculate category averages to identify vendor strengths and weaknesses. Documenting these findings in executive-ready formats follows the same principles that govern [high-impact content performance](#).

Data and signals

10 questions to ask

Data quality is the foundation of every other vendor capability. The following questions expose whether a provider delivers actionable intelligence or repackaged data of uncertain origin.

- 1 Data origin disclosure:** Where does your intent data originate, and what percentage comes from first-party collection versus third-party aggregators?
- 2 Collection methodology:** What specific behaviors constitute an intent signal in your taxonomy, and how do you weigh different actions?
- 3 Refresh frequency:** How often is intent data updated, and what is the average latency between signal capture and platform delivery?
- 4 Signal decay parameters:** At what point do you deprecate stale signals, and how do you communicate decay status to clients?
- 5 Bot traffic filtering:** How do you distinguish genuine research behavior from automated crawlers, competitor intelligence gathering, or security scanning?
- 6 False positive rates:** What percentage of flagged accounts show no subsequent engagement, and how do you measure signal accuracy?
- 7 Account-to-contact mapping:** How do you associate anonymous signals with specific buying group members rather than generic company records?
- 8 Consent and compliance documentation:** What audit trail exists for data collection consent, particularly for signals originating in GDPR or CCPA jurisdictions?
- 9 Signal exclusivity:** How many other clients receive the same intent signals simultaneously, and do you offer exclusivity tiers?
- 10 Integration with first-party data:** How does your platform reconcile third-party signals against client-owned engagement data?

[Read the 5 Steps to Futureproof Your Demand With First-Party Data and explore validation frameworks for this reconciliation process](#)



Coverage accuracy

3 questions to ask

Coverage verification against a specific target account list must happen before contract signature, since headline coverage percentages often obscure segment-level depth. Coverage evaluation must extend beyond top-line numbers to segment-level depth, buying group reach, and regional distribution.

- 1 Target account list match rate:** When tested against a sample of our actual target accounts, what percentage does your platform track, and can you provide segment-level breakdowns by industry, company size, and region?
- 2 Contact depth per account:** How many personas does the platform identify within each covered account on average, and how does that depth vary across tier 1 versus tier 2 accounts?
- 3 Regional and international coverage:** How does coverage depth vary across North America, EMEA, and APAC, and what underlying data collection infrastructure operates in non-North American markets?

Buyers should require segment-level and regional breakdowns, as aggregate-only coverage typically degrades substantially against a specific target list.

Integration and workflow

6 questions to ask

Integration failures produce zero pipeline value regardless of vendor data quality, because signals that do not reach the workflows sales representatives actually use never convert to opportunity.

- 1 Native connector availability:** Are pre-built connectors available for your specific CRM and marketing automation platform versions, or only generic integrations for the platform family?
- 2 Sync frequency, direction, and custom field mapping:** How often does data synchronize, does the integration support bi-directional flow that updates both systems in near real-time, and can the integration map to custom fields and objects in your CRM?

- 3 API rate limits:** What application programming interface (API) call limits apply to the integration, and how is throttling handled during high-volume periods?
- 4 Webhook availability:** Does the platform support webhooks for event-driven data transfer, reducing reliance on scheduled batch syncs?
- 5 Integration maintenance ownership:** When platform updates break existing connections, who handles remediation: the vendor or the client's technical team?
- 6 Failure protocols and SLAs:** What alerting mechanisms are used to notify teams when integrations fail, and what SLAs govern restoration timelines and rollback procedures?

Discover how to drive ROI with demand intelligence and explore the frameworks for evaluating whether vendor data reaches the frontline users who convert it into pipeline activity



Compliance readiness

4 questions to ask

Privacy regulation exposure has become a material vendor risk as GDPR, CCPA, and emerging state and international privacy laws expand enforcement. Compliance questions must surface documented evidence rather than verbal assurance.

- 1 Certification inventory:** What privacy, security, and data governance certifications does your organization hold (SOC 2 Type II, ISO 27001, GDPR compliance audits, CCPA readiness attestations), and can you provide current documentation for review?
- 2 Data processing agreements and subprocessors:** What standard data processing agreement (DPA) terms apply to your contracts, what subprocessors do you rely on, and how are clients notified when the subprocessor list changes?
- 3 Consent management and opt-out handling:** How does your platform honor opt-out requests, cross-border data transfer restrictions, and right-to-deletion requirements, and what SLA governs the timeline for honoring each request type?
- 4 Breach notification protocols:** What breach notification timelines and procedures apply when your platform experiences a security incident affecting client data, and how do those timelines align with GDPR 72-hour and CCPA notification requirements?

Delivery and support

6 questions to ask

Post-sale support quality determines whether purchased capabilities translate into operational value or sit unused after initial deployment.

- 1** **Named contact assignment:** Does your organization provide a dedicated client success manager (CSM), or does support route through pooled queues?
- 2** **CSM-to-client ratio and stability:** What is the current ratio of CSMs to active accounts, and how has that ratio changed over the past 12 months?
- 3** **Onboarding timeline and milestones:** What specific deliverables define onboarding completion, and what is the average time from contract signature to full operational deployment?
- 4** **Response time versus resolution time:** Since SLAs often guarantee initial response within hours while resolution stretches across days, what are the documented commitments for each metric by severity tier?
- 5** **Escalation pathways and penalties:** When standard support channels fail to resolve issues, what escalation process exists, and what financial remedies or service credits apply when committed SLAs are missed?
- 6** **CSM transition protocols:** When your assigned CSM leaves the company, what handoff process ensures continuity of account knowledge and open issue tracking?

[Improving B2B digital experience](#) depends on support structures that maintain momentum after initial deployment.

Pricing and contracts

6 RFP questions to prevent disputes

Contract disputes often emerge from costs that surface only after signature. Vendors usually divide themselves into two cost models: platform-access subscriptions that charge license fees plus campaign costs separately, and bundled or managed offerings that include technology within program pricing.

- 1 Cost model and base fee structure:** Is the pricing structure platform-access subscription plus campaign costs, or bundled program pricing? What does the quoted price include, and what services or features require additional licensing fees?
- 2 Total cost of operation:** Beyond the quoted subscription or program fee, what additional costs should we expect across integration and middleware, internal team time, ongoing optimization, and user scaling as the program grows?
- 3 Overage calculations:** When lead volumes exceed contracted thresholds, what per-lead or percentage-based charges apply, and at what intervals are overages invoiced?
- 4 Implementation and onboarding costs:** What one-time fees apply for initial setup, data migration, and training, and are these costs fixed or estimated?
- 5 Renewal and escalation terms:** What is the auto-renewal default, how many days before renewal must the cancellation notice be provided, and what caps exist on annual price increases?
- 6 Data portability at termination:** What file formats will data exports use, what is the timeline for delivery after contract end, and what fees apply for extraction assistance?

[Read the full Demand Marketer's Guide to Intent Activation and uncover how to leverage intent data](#)



Proof and validation

5 questions to pressure-test vendor claims

Return on investment claims need verifiable evidence, as ROI demonstration ranks as a top vendor shortlisting factor for 37% of B2B buyers ([INFUSE Voice of the Buyer, 2026](#)).

- 1 Proof-of-concept availability:** Is a paid pilot using the client's actual data and systems available, or only demonstrations with sanitized sample environments? Who defines the metrics that determine pilot success, and are those metrics documented before the engagement begins?
- 2 Industry-specific references:** Can references be provided from organizations in the same industry vertical and approximate company size as the client's, not flagship logos from unrelated segments?
- 3 Pipeline-verified case studies:** Do published case studies include verifiable pipeline and revenue outcomes, or do they report only vanity metrics such as impressions and form completions?
- 4 Methodology transparency:** Will the vendor explain how their data collection and scoring models work, including refresh frequency and source diversity?
- 5 Unsupervised client contact:** Can a current client be contacted directly without vendor participation?

Key takeaways

Know what questions to ask demand generation vendors: Vendor selection without structured evaluation criteria produces pipeline leakage. Systematic questioning before contract signature is the answer to this challenge, preventing misalignment that compounds across the engagement lifecycle.

Require methodology transparency: Data quality questions about source diversity, refresh frequency, and false positive rates should precede any pilot commitment.

Demand pipeline-verified evidence: Case studies must document revenue outcomes rather than engagement metrics alone, since vanity metrics rarely correlate with pipeline impact.

Secure unsupervised references: Direct client contact without vendor participation produces the unfiltered perspective that demos alone cannot.

Document success metrics upfront: Undefined success criteria create post-sale disputes that erode projected returns.

Treat evaluation as ongoing: Vendor capabilities shift as market conditions change, requiring periodic reassessment rather than single-point qualification.

TURN VENDOR DUE DILIGENCE INTO PIPELINE RESULTS

Our INFUSE demand experts build campaigns grounded in current buyer behavior and market intelligence.

[Speak to a demand expert to apply research-backed evaluation criteria to your demand generation programs.](#)



FAQs

What are the seven categories every vendor evaluation should cover?

The seven evaluation categories are data quality, coverage accuracy, integration capabilities, compliance readiness, support structure, pricing transparency, and contract flexibility. Each maps to different internal stakeholders: data and coverage involve RevOps and analytics teams; integration routes through technical leadership; compliance requires legal and security review; support, pricing, and contract belong with procurement and finance.

How should a buying team split 40 questions across stakeholders?

Split evaluation questions by stakeholder. Marketing and revenue ops handle data, coverage, and integration. Legal and security handle compliance. Finance and procurement handle pricing and contracts. This ensures each topic is reviewed by the right team.

What is the difference between a demo and a proof of concept?

A demo is a vendor-run presentation using idealized data. A POC uses your real data, accounts, and workflows over several weeks to test actual performance. It also defines success metrics upfront so results can be measured. Unlike demos, POCs provide real proof, not claims.

What red flags should immediately disqualify a vendor?

Five red flags warrant immediate disqualification: opacity about data sourcing methodology, aggregate-only coverage metrics without segment-level breakdowns, resistance to structured proof-of-concept testing, missing or superficial integration documentation, and inability to produce current compliance certifications on request. Encountering multiple flags simultaneously indicates substantive capability gaps that pricing advantages cannot compensate for.

Should the checklist change for demand generation versus intent data vendors?

The seven-category framework applies to both, but category weighing should shift based on use case. Intent data vendors warrant heavier scrutiny on signal methodology, coverage accuracy, and data refresh cadence. Demand generation vendors warrant heavier scrutiny on delivery quality, compliance documentation, and pricing transparency since the vendor is executing programs on the buyer's behalf rather than supplying raw signals.



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