

Domain Methods

Data Partner Evaluation Scorecard

Use this lightweight worksheet to compare analytics, RevOps, and data partners using the same operating criteria.

1. Define the problem first

- ? What decision or reporting problem are you hiring to solve?
- ? What will better trust look like in 90 days?

2. Weight the categories before vendor calls

- ? Technical depth
- ? Business context
- ? Speed to value
- ? Communication style
- ? Reference quality
- ? Engagement model fit
- ? Pricing transparency

3. Score each vendor from 1 to 5 in every category

- ? 1 = weak / high risk
- ? 3 = acceptable with caveats
- ? 5 = clearly differentiated strength

4. Reference-call prompts

- ? What improved after the engagement?
- ? What broke, and how was it handled?
- ? Could your team own the work after handoff?
- ? Would you hire them again for the same problem?

5. Red flags

- ? jumps to tools before clarifying the decision
- ? vague handoff or documentation plan
- ? treats governance as optional
- ? says yes to everything without tradeoffs

6. Final recommendation

- ? Which partner reduces decision risk fastest?
- ? Which partner best fits your internal team and timeline?