

Choose with evidence.

A practical evaluation workbook for healthcare sales teams. Complete digitally or print for your vendor demos.

Team / company

Evaluation date

01 Prepare a consistent brief

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Target sample

Bring 25 accounts and 25 people across your actual segments and territories.

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Required intelligence

List essential fields, specialties, technology and operating attributes.

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Relationship requirements

Include parent entities and primary, secondary, visiting and procedural sites.

☐

Workflow and access

Document your CRM, API, matching and field mapping requirements.

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Complete cost

Include seats, modules, exports, onboarding, integrations and renewal terms.

☐

Pilot success criteria

Agree how to measure accuracy, coverage, usefulness and seller preparation time.

02 Define the job to be done

What should a seller be able to do better after using the tool?

Keep the sample, tasks and scoring consistent across every provider.

Compare the proof.

Complete one scorecard per vendor. Use demonstrated evidence and record any unanswered questions.

Vendor / product / package

Reviewer

03 Score your pilot

0 = not demonstrated | 1 = partial fit | 2 = meets needs | 3 = strong fit

EVALUATION AREA	0-3	EVIDENCE / GAPS
Correct identity matches Facility, parent and person resolution		
Required field coverage Availability for your actual targets		
Relationship usefulness Relevant affiliations and decision context		
Freshness and clarity Source, period and update method		
Seller workflow Preparation quality and time		
Delivery and total cost CRM / API fit and complete quote		

Use scores as a discussion aid. Do not let a total override a missing essential requirement.

Decision and next step

Evaluate Intent.Health on the accounts you actually sell to.

[Book a demo](#)