

Demo checklist: 20 questions to ask

Take this into every vendor demo. Tick each question once it has been answered clearly, and note the answer.

Measurement

- ☐ What exactly does the survey ask about, and how many people are needed for a group result?
- ☐ What is it compared against?
- ☐ What research stands behind the questions, and what has been tested?
- ☐ Does it measure what people want to do, what they can keep doing, or both?

Privacy

- ☐ Can any person at the employer see an individual's answers or score?
- ☐ What is the smallest group a manager can see?
- ☐ What does the employee see, and who else can?
- ☐ Where is data stored, and who processes it?

Action

- ☐ What does a manager do on Monday after seeing a result?
- ☐ Is there an action plan, and who owns it in the product?
- ☐ What do employees get: learning, tools, a private result?
- ☐ How is progress shown on the next survey?

Delivery

- ☐ How are employees loaded: HR system sync, a file upload, single sign-on?
- ☐ Which languages are available for each type of user?
- ☐ What does onboarding include at our size?
- ☐ What support is included, and what costs extra?

Commercial

- ☐ What sets the price: employees invited, employees answering, modules?
- ☐ What is excluded from the quote?
- ☐ What happens to the price at renewal, and how much notice is given?
- ☐ Can we speak to a customer of a similar size?



Warning signs

- ☐ A single score with no explanation of what it combines
- ☐ Individual results visible to managers
- ☐ No minimum group size
- ☐ A security certification described as held when it is "in progress"
- ☐ A claim about results with no named source
- ☐ A price that cannot be explained in a sentence
- ☐ No reference customers and no answer on why