

Life Sciences Sales Enablement Tool Evaluation Checklist



Evaluate your options confidently with this essential checklist. Designed to guide you in identifying the must-have features and capabilities for a life sciences prospecting tool, this checklist helps you objectively assess tools side-by-side, ensuring you make the best choice for your sales and business development needs.

1 Data Accuracy & Recency

- Are data updates in real time, reflecting recent changes such as new trials, mergers, or funding rounds?
- Does the tool include built-in data hygiene (e.g. automatic removal of inactive companies)?
- Can it differentiate between active and inactive companies to avoid stale leads?
- Is the data accuracy maintained through Al-driven updates, ensuring fewer errors than manual updates?
- Does the tool provide visibility into data source quality and credibility?

2 Contextualized, Actionable Insights

- Does the tool filter and prioritize information based on relevance to life sciences sales and BD needs?
- o Can the tool highlight key actionable insights, such as upcoming studies, leadership changes, recent partnerships, or funding updates?
- Is the information easily digestible, avoiding overwhelming volumes of raw data?
- Does the tool offer context-rich insights (e.g., funding history, therapeutic focus) for better outreach decisions?
- Can the tool customize notifications for specific triggers (e.g., trial launches, new partnerships) to surface relevant opportunities?

3 Prospect Segmentation & Targeting

- Ones the platform allow for detailed segmentation by therapeutic area, company size, or funding history?
- Can it identify companies based on recent activity or milestones, such as new trials, funding rounds, or leadership changes?
- Does it support segmentation by clinical trial phases or study types, helping to focus on prospects at stages relevant to your offerings?
- o Is there geographic filtering to focus on prospects within specific regions or market segments?
- Can users create custom lists of segmented prospects for outreach campaigns and easily update them over time?



4 Reporting & Analytics

- o Does the tool provide metrics on data usage, outreach effectiveness, or prospecting performance to gauge ROI?
- Can the tool integrate with analytics platforms to visualize key metrics and performance indicators?
- o Is there reporting on prospect engagement, lead scoring, or sales cycle timelines for better pipeline management?
- Can users generate reports on specific KPIs to optimize future sales efforts?
- Does the tool offer insights into prospect behavior and engagement patterns that inform strategic decision-making?

5 Customer Support & Training

segmentation strategy or report generation?

Does the tool provide access to a dedicated account manager or support team?
Are response times quick (e.g., within 24 hours) for any troubleshooting or support needs?
Does the platform offer comprehensive onboarding and training options, such as one-on-one sessions, recorded tutorials, and group sessions?
Is there ongoing support for training new team members or providing additional resources?
Are there ad-hoc project support options available, such as consultation on

Conference & Event Coverage

Does the tool provide exhaustive conference coverage, including exhibitor and attendee lists and abstracts?
Can the platform prioritize companies/contacts within conference data based on role, company size, or relevance to your business?
Are session abstracts, speaker details, and exhibitor information readily accessible?
Is the tool capable of updating with new attendee information pre- and post-conference?
Can users export or integrate attendee lists into CRM systems for follow-up outreach?

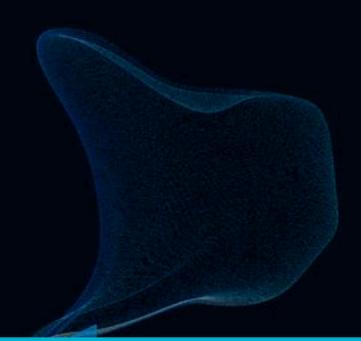
7 Pricing & Scalability

- Ones the tool offer a trial or demo period to assess its fit with your team's specific needs?
- Does the tool offer flexible, tiered pricing that aligns with company size and needs?
- o Can the tool easily scale with your company's growth, supporting additional seats or advanced features as needed?
- Are there discounted options or flexible invoicing schedules available for budget-constrained teams?
- Is the pricing model clear and consistent, without geographic price variations or hidden fees?



8 CRM & Integration

- o Does the tool offer native CRM integration without needing extensive API work or IT support?
- o Is the integration seamless and real-time, ensuring that prospecting data updates automatically?
- Does it provide a single, consistent view of prospects across CRM and sales tools?
- Can it sync across multiple CRMs if needed (e.g., HubSpot, Salesforce)?
- o Is setup and data transfer relatively quick, with minimal IT involvement?



Scorecard for

[Tool Name]

Data Accuracy & Recency
Contextualized, Actionable Insights
Prospect Segmentation & Targeting
Reporting & Analytics
Customer Support & Training
Conference & Event Coverage
Pricing & Scalability
CRM Integration