

EDITION 01 · 2026

100 Questions to Ask Every MarTech Vendor

A field guide for getting past the demo. Ten areas, from data architecture to contract terms, with the red flags that should make you slow down.

● DATA MODEL

● CRM SYNC

● AI & AUTOMATION

● SEGMENTATION

● EMAIL

● ATTRIBUTION

● IMPLEMENTATION

● SECURITY

● PRICING

● SUPPORT

Most MarTech regrets are discovered in month four.

Most MarTech purchases are decided by the demo. The demo shows the happy path: a clean dataset, a pre-built workflow, a dashboard that already has numbers in it. What it never shows is how the platform behaves when your Salesforce instance has eleven years of custom fields, your lead-to-account matching is inconsistent, and your MOps team is two people covering five tools.

These 100 questions are built to get past the demo. They are grouped into ten areas, from data architecture to contract terms. Each section ends with the red flags that should make you slow down.

● ASK OUT LOUD ON A CALL

● PASTE INTO AN RFP

● SEND AS A PRE-READ

THREE GROUND RULES

01 Ask for proof, not promises.

A live walkthrough in a sandbox, a customer reference at your scale, or a link to documentation.

02 Ask every vendor the same questions.

Consistency is the only way the answers become comparable across your shortlist.

03 Watch how quickly they get specific.

The best vendors answer with numbers, limits, and tradeoffs, not adjectives.

Ten areas. One hundred questions.

01	Data model and architecture	Q01-10	P.04
02	CRM integration and sync	Q11-20	P.05
03	AI and automation	Q21-30	P.06
04	Segmentation, scoring, and personalization	Q31-40	P.07
05	Email and deliverability	Q41-50	P.08
06	Attribution and reporting	Q51-60	P.09
07	Implementation and migration	Q61-70	P.10
08	Security, privacy, and compliance	Q71-80	P.11
09	Pricing and contracts	Q81-90	P.12
10	Support, roadmap, and vendor viability	Q91-100	P.13
→	How to score the answers	SCORECARD	P.14

Data model and architecture

Everything else in your stack inherits the limits of the data model. If a platform cannot represent accounts, buying groups, and product usage natively, every campaign you build will be a workaround.

- 01What objects does your data model support natively (leads, contacts, accounts, opportunities, custom objects), and which ones require a workaround?
- 02Can I model account hierarchies and buying groups, or is everything ultimately keyed to an individual person record?
- 03How do you handle lead-to-account matching, and can I see the match logic and override it?
- 04What are the hard limits on records, custom fields, and custom objects at my contract tier?
- 05Can I bring in product usage, billing, or data warehouse tables without a third-party ETL tool? How fresh is that data once it lands?
- 06How do you handle duplicate records, and is deduplication automatic, rules-based, or manual?
- 07Where does the source of truth live for each field, and how do you resolve conflicts when two systems write to the same field?
- 08Can I query and export my raw data at any time, in what format, and is there a fee or rate limit?
- 09How do you store engagement history, and how far back can I report on it?
- 10What happens to my data model when your schema changes in a product release?

× RED FLAGS

- × "Everything is a contact."
- × Custom objects that only exist for display, not segmentation.
- × Export that requires a support ticket.

CRM integration and sync

The CRM sync is where most marketing automation platforms quietly break. Sync delays, API limit overages, and overwritten fields create problems that sales feels long before marketing notices.

- 11 Is your CRM sync bidirectional, and what is the typical and worst-case latency in both directions?
- 12 How many CRM API calls does your sync consume per day at my volume, and what happens when we hit our limit?
- 13 Which CRM objects can you sync (including custom objects and campaign members), and which are read-only?
- 14 Can I control sync rules field by field, including which system wins on conflict?
- 15 How do you handle records that fail to sync? Where do I see errors, and can I retry them in bulk?
- 16 Do you write activity history back to the CRM, and does it clutter the timeline sales actually uses?
- 17 How do you sync campaign membership and status for attribution in the CRM?
- 18 What happens to the sync during a CRM sandbox refresh, a field rename, or a picklist change?
- 19 Can I see a log of every change your platform made to a CRM record, and by which rule?
- 20 Do you need a dedicated integration user and a managed package, and what permissions do they require?

× RED FLAGS

× Sync measured in “up to” hours.

× No error log.

× A managed package that requires admin-level access across every object.

AI and automation

Every vendor now has an AI story. The useful question is not whether AI exists in the product, but what it actually does on its own, what it can touch, and how you stay in control when it is wrong.

- 21 Show me one AI feature end to end on real data. What does it do that a human used to do, and how much time does it save?
- 22 Is your AI a copilot that suggests, an agent that acts, or both? Which actions can it take without human approval?
- 23 Which models power your AI features, and can I choose or restrict them?
- 24 Is my data used to train models that serve other customers? Can I opt out contractually?
- 25 How do I review, approve, or roll back something the AI built or changed?
- 26 How does the AI learn my brand voice, ICP, and naming conventions, and where do I edit that context?
- 27 How do you measure AI accuracy, and what happens when it produces a wrong segment, email, or workflow?
- 28 Are AI features included in my price, or metered by credits, tokens, or actions?
- 29 Can I build and edit workflows without AI, in a visual builder, when I want full manual control?
- 30 What is on your AI roadmap for the next 12 months, and which of today’s demo features are generally available versus beta?

× RED FLAGS

× No audit trail for agent actions.

× Credit-based pricing with no published rate card.

Segmentation, scoring, and personalization

Segmentation is where your data model meets your strategy. If building an audience takes a ticket, a CSV, and a day, your team will run fewer, broader, worse campaigns.

- 31 Can I segment on any field across people, accounts, opportunities, and custom objects in a single filter?
- 32 Are segments dynamic and recalculated in real time, or on a schedule? How long does a large segment take to refresh?
- 33 Can I build a segment from behavioral data, such as product usage or intent signals, without a data engineer?
- 34 How does lead scoring work: rules, AI, or both? Can I run person scores and account scores side by side?
- 35 Can I see exactly why a record has its score, rule by rule?
- 36 Can I test a scoring model against historical data before turning it on?
- 37 How do you handle score decay and resets when a lead recycles?
- 38 What personalization is possible beyond first name and company: dynamic content blocks, account-level content, AI-generated copy?
- 39 Can segments sync out to ad platforms like LinkedIn and Meta, and how often?
- 40 Who on my team can build segments and scores without admin rights, and what guardrails exist?

× RED FLAGS

× Scores that cannot be explained.

× Segments limited to a fixed set of fields.

× Ad audience syncs that run weekly.

Email and deliverability

Email is still the workhorse channel, and deliverability is the variable vendors talk about least. A beautiful builder means nothing if your messages land in spam.

- 41 Do you send on shared IPs, dedicated IPs, or both? What does a dedicated IP cost, and who manages warmup?
- 42 What is your average inbox placement rate, and can you show it for customers at my volume?
- 43 How do you support SPF, DKIM, DMARC, and one-click unsubscribe requirements from Google and Yahoo?
- 44 What bounce, complaint, and suppression handling is automatic?
- 45 How does your email builder handle responsive design, dark mode, and rendering previews across clients?
- 46 Can marketers who do not write HTML build on-brand emails from templates without breaking them?
- 47 How do you handle send-time optimization, throttling, and frequency caps across all programs?
- 48 Can I manage subscription preferences by topic, and does that preference center sync to the CRM?
- 49 What email metrics do you report, and how do you account for inflated opens from privacy proxies and bot clicks?
- 50 What are your send limits per hour and per day, and what happens when a large send exceeds them?

× RED FLAGS

- × No published deliverability data.
- × Open rates reported without any bot or privacy filtering.
- × Frequency caps that only apply within a single program.

Attribution and reporting

If you cannot show marketing's impact on pipeline, your budget is at risk no matter how good your programs are. Reporting is where you find out whether the platform was built for marketers or for the board deck.

- 51 Which attribution models do you support out of the box, and can I build a custom one?
- 52 Do you attribute at the person level, the account level, or the opportunity contact role level?
- 53 How do you capture first touch and UTM data, and what happens to it when a lead converts or merges?
- 54 Can I report on pipeline and revenue influenced by a campaign without exporting to a spreadsheet?
- 55 Can marketers build their own reports, or does every new view require MOps or a BI tool?
- 56 How do you handle offline touches like events, direct mail, and sales meetings?
- 57 Do your numbers reconcile with what the CRM shows? If not, which is the source of truth and why?
- 58 Can I report on funnel conversion and velocity by stage, segment, and cohort?
- 59 Can I push your data into my BI tool or warehouse on a schedule, and at what granularity?
- 60 Can I build a dashboard I would confidently show my CEO in the first 30 days?

× RED FLAGS

× Attribution that only counts form fills.

× Dashboards that need a separate analytics add-on.

× Numbers that never match the CRM.

Implementation and migration

Switching platforms is the single biggest reason teams stay on tools they have outgrown. A vendor who has done many migrations will have a specific plan; one who has not will have a reassuring tone.

- 61What is the realistic timeline from signature to first live campaign for a company like mine?
- 62Who does the implementation work: your team, a partner, or mine? What is included in the price?
- 63What exactly do you migrate for me: programs, emails, templates, forms, landing pages, scoring, history?
- 64How do you migrate engagement history so scoring and attribution are not reset to zero?
- 65Can we run your platform in parallel with our current one, and for how long?
- 66What do you need from my CRM admin, my web team, and my MOps team during implementation, in hours per week?
- 67How do you handle forms, tracking scripts, and landing pages already live on our website?
- 68What does a failed or stalled implementation look like, and what do you do about it?
- 69Can I talk to two customers who migrated from the same platform we use today?
- 70When is implementation considered done, and what are the success criteria in writing?

× RED FLAGS

- × A timeline given before they have seen your instance.
- × “Professional services” quoted separately after the deal is signed.
- × No references who migrated from your current tool.

Security, privacy, and compliance

Your security team will ask these questions eventually. Asking them early saves weeks at the end of the deal and tells you how mature the vendor really is.

- 71 Which certifications do you hold today (SOC 2 Type II, ISO 27001, others), and can I see the latest report?
- 72 Where is my data hosted, and can I choose the region?
- 73 How do you support GDPR, CCPA, and other consent requirements, including data subject deletion requests?
- 74 How is consent captured, stored, and enforced at send time?
- 75 Do you support SSO, SCIM provisioning, and role-based permissions down to the asset level?
- 76 Which subprocessors touch my data, including any AI model providers?
- 77 How is data encrypted in transit and at rest, and who at your company can access it?
- 78 What is your incident response process, and how quickly will you notify me of a breach?
- 79 Is there a full audit log of user and system actions, and how long is it retained?
- 80 What happens to my data, and how do I get it back, if I leave?

× RED FLAGS

- × Certifications described as “in progress” with no date.
- × AI providers missing from the subprocessor list.
- × No answer for data return at termination.

Pricing and contracts

The price on the order form is rarely the price you pay over three years. Database growth, add-ons, and renewal uplifts are where total cost of ownership hides.

- 81What is the pricing metric: contacts, active records, sends, seats, or credits? Which records count toward it?
- 82What happens to my bill when my database grows 30% next year?
- 83Which features in the demo are add-ons, and what does each cost?
- 84Is implementation, training, and premium support included or billed separately?
- 85What is your standard renewal uplift, and will you cap it in writing?
- 86Can I start with a shorter term or a pilot before committing to multiple years?
- 87What are the overage charges, and do you notify me before I incur them?
- 88Can I reduce seats, records, or modules at renewal, or only add them?
- 89What are the termination terms, and are there any exit or data export fees?
- 90What will my all-in cost be in year three, assuming normal growth? Put it in writing.

× RED FLAGS

- × Pricing that only exists as a custom quote.
- × Uncapped renewal increases.
- × Contracts that allow upgrades but not downgrades.

Support, roadmap, and vendor viability

You are not buying software; you are buying a multi-year relationship with a company. How a vendor supports customers after the deal tells you more than anything they say before it.

- 91What support channels are included at my tier, and what are your response times by severity?
- 92Will I have a named customer success manager, and how many accounts does that person cover?
- 93Is support staffed by people who understand marketing operations, or by general ticket triage?
- 94How often do you ship product updates, and how are breaking changes communicated?
- 95How do customers influence the roadmap, and can you show me a recent feature that came from a customer request?
- 96What are your gross retention and net retention rates, roughly?
- 97How many customers like me, by size and industry, are live on the platform today?
- 98What training and certification do you offer for my team, and is it included?
- 99Is there an active community, partner ecosystem, or talent pool I can hire from?
- 100If we sat down a year from now and this purchase had failed, what would the most likely reason be?

× RED FLAGS

- × A CSM who covers more than 50 accounts.
- × A roadmap that cannot point to a single customer-driven feature.
- × A vendor who cannot answer question 100 honestly.

How to score the answers

Score every answer on a simple three-point scale, then compare vendors by section rather than by total. A vendor that wins on email but loses on data model will cost you more over three years than the reverse.

● SCORE

2

Specific answer, shown live or backed by documentation or a reference.

● SCORE

1

Credible answer, but verbal only or with caveats to confirm.

● SCORE

0

Vague, deferred to “later in the process,” or not supported.

WEIGHT THE SECTIONS THAT MATCH YOUR BIGGEST PAIN

● CRM SYNC PAIN → 2× SECTIONS 01 + 02

● BOARD ASKING ABOUT PIPELINE → 2× SECTION 06

● MOSTLY ZEROS → DEALBREAKER

#	SECTION	WEIGHT	VENDOR A	VENDOR B	VENDOR C
01	Data model and architecture	1×	-- / 20	-- / 20	-- / 20
02	CRM integration and sync	1×	-- / 20	-- / 20	-- / 20
03	AI and automation	1×	-- / 20	-- / 20	-- / 20
04	Segmentation, scoring, personalization	1×	-- / 20	-- / 20	-- / 20
05	Email and deliverability	1×	-- / 20	-- / 20	-- / 20
06	Attribution and reporting	1×	-- / 20	-- / 20	-- / 20
07	Implementation and migration	1×	-- / 20	-- / 20	-- / 20
08	Security, privacy, compliance	1×	-- / 20	-- / 20	-- / 20
09	Pricing and contracts	1×	-- / 20	-- / 20	-- / 20
10	Support, roadmap, viability	1×	-- / 20	-- / 20	-- / 20

ONE LAST THING

The best vendors will welcome these questions, because the answers are where they win.

Conversion will answer all 100 on a live call, in our product, on your data.

[BOOK A WALKTHROUGH →](#)

● ROUTING

● AGENTIC ABM

● REPORTING & ATTRIBUTION

● CUSTOMER ENGAGEMENT