ScopeB2B
SOLUTIONS

PROCUREMENT GUIDE · 2026

WHAT TO ASK BEFORE YOU SIGN

What to Ask a Data Vendor Before You Sign.

15 questions every procurement team and GTM leader should ask a B2B data vendor — and what the answers really reveal.

15	3	7
Questions to ask	Evaluation categories	Pages

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WHY THIS GUIDE EXISTS

The questions that separate serious vendors from the rest.

Most B2B data vendors can answer general questions. The questions in this guide are designed to surface the ones they **can't — or won't.** A vendor that deflects on sourcing methodology, can't produce a signed DPA, or won't explain their verification process is telling you something important. Use this guide before you sign anything.

HOW TO USE THIS GUIDE

15 questions across three categories — **Sourcing & Accuracy**, **Compliance & Legal**, and **Quality & Delivery**. For each, we explain why it matters, what a credible answer looks like, and what a non-answer tells you.

Section 1
Sourcing & Accuracy

Questions 1–5. Where does the data come from? How is it verified? What's the actual accuracy rate — and is it backed by anything in writing?

Section 2
Compliance & Legal

Questions 6–10. Can they produce a DPA? Is their GDPR posture real or performative? Who owns liability when a record shouldn't have been sold?

Section 3
Quality & Delivery

Questions 11–15. How fresh is the data? What happens when a record fails? Can they deliver in your format, on your timeline, into your CRM?

A note on vendor responses — a credible vendor answers these directly, in writing, without a sales call first. If you're told "our team will follow up on that," treat it as a red flag, not a scheduling issue.

Section 01 QUESTIONS 1–5

Sourcing & Accuracy

Provenance determines whether the data holds up in a campaign, a board deck, or a procurement audit — yet it's the least-asked category.

Q1

Can you explain exactly how your data is sourced — step by step?

Why it matters: A vendor with a real methodology can explain it in plain language. "Proprietary sources" and "multiple data partners" are not answers. **Look for** named source categories, a documented pipeline, and source attribution on delivered records. If they won't tell you, the answer is probably a scraper.

Q2

What percentage of your database is human-verified versus machine-verified?

Why it matters: Automated email pings are not human verification — tele-verification by a live agent is. A credible vendor gives you a split: X% tele-verified, Y% SMTP-validated, Z% source-only. Evasion here means the answer is "almost none."

Q3

What is your committed accuracy rate — and what happens when records fall below it?

Why it matters: Any vendor can claim 95%+. The test is what they commit to **in writing** and what the remedy is. Look for a written accuracy commitment, a replacement policy (not a credit), and a clear flagging process. No replacement policy means the accuracy claim is marketing.

Q4

Can you show source attribution on delivered records — where each came from?

Why it matters: A database built with integrity can show provenance. If a vendor can't tell you whether a record came from a public, proprietary, or partner source, they either don't know or don't want you to. It's also a GDPR legitimate-interest requirement — not optional.

Q5

How do you handle contacts who have left the company or changed roles?

Why it matters: B2B data decays 20–30% per year. A database without a left-company check is selling you stale data. Ask the job-change detection methodology, how often it runs, and how fast a departed contact is flagged. Monthly is acceptable; on-demand only is not.

Section 02 QUESTIONS 6–10

Compliance & Legal

GDPR has real enforcement teeth — the ICO, CNIL, and BfDI have levied significant fines. Your vendor's compliance posture is your risk.

Q6

Can you produce a signed Data Processing Agreement (DPA) before we begin?

Why it matters: Any vendor processing EU/UK personal data on your behalf needs a DPA. "We'll sort it post-contract" is a serious red flag. A credible vendor has a standard DPA ready to sign and will review your template. Ask to see it before the commercial conversation.

Q7

What is your lawful basis for processing B2B contact data under GDPR?

Why it matters: The correct answer is "legitimate interest" with a documented Legitimate Interests Assessment (LIA). If they say "consent," ask how consent was obtained for 300M+ records. If they can't name the lawful basis at all, do not proceed with EU data.

Q8

How do you process opt-out and do-not-contact requests? What is your SLA?

Why it matters: GDPR requires erasure "without undue delay." Ask for the specific SLA in hours, not days, and whether suppression applies globally or only to future deliveries. 72 hours is the standard we hold ourselves to.

Q9

Who bears liability if a delivered record results in a regulatory complaint?

Why it matters: The question vendors hate most. Many disclaim all liability and require you to indemnify them. A credible vendor takes reasonable responsibility for records from their database and carries appropriate coverage. Have legal review the indemnification clause.

Q10

Can you deliver a list of your current sub-processors?

Why it matters: Under GDPR your vendor must disclose sub-processors. If they use AWS, Google Cloud, or a data partner, those count. A credible vendor maintains and discloses this list — resistance is a governance concern. It should be in the DPA or available on request.

Section 03 QUESTIONS 11–15

Quality & Delivery

These determine whether the data actually works in your workflow — and what happens when it doesn't.

Q11

What is your database refresh cadence — and how is it applied?

Why it matters: Ask what percentage of the database is refreshed per quarter. Below 20% means a significant portion could be 12+ months old at any time. Also ask whether active client datasets are refreshed on a separate cycle — they should be.

Q12

Can you deliver directly into our CRM — and how does field mapping work?

Why it matters: Direct CRM delivery (Salesforce, HubSpot, Pipedrive, Zoho, Dynamics) should be standard. A good vendor maps to **your** field schema, not a generic template your ops team must remap on import. Ask for a field-mapping template before you sign.

Q13

What is your minimum engagement size and typical delivery timeline?

Why it matters: A vendor that needs 6 weeks for 500 records is running manual-only operations. Look for a sample in 48–72 hours, full delivery in 5–10 business days for standard builds, and clear communication about what delays a timeline.

Q14

Do you include an audit trail with deliveries — and what does it contain?

Why it matters: An audit trail is how you defend data use to procurement, legal, or a DPA request. A credible one contains record source, verification date, QA reviewer tag, compliance flags, and last-updated date. "On request" is not the same as "included with every delivery."

Q15

Have you worked under NDA, and can you provide references?

Why it matters: References from clients in your industry or at similar scale are the fastest way to validate a vendor's claims. A credible vendor has clients willing to speak — or a case study with real metrics. NDA willingness is itself a marker of operational professionalism.

HOW SCOPEB2B ANSWERS ALL 15

We can answer every question.

We wrote this guide because we can answer all 15 — buyers who ask them are the clients we do our best work for.

#	TOPIC	OUR ANSWER
Q1	**Sourcing methodology**	Documented **7-stage pipeline** — sourcing → AI extraction → human research → 4-eyes QA → tele-verification → compliance → delivery.
Q2	**Human vs machine**	All direct dials **tele-verified by live agent**. Work emails SMTP-validated. Source-only records clearly tagged.
Q3	**Accuracy commitment**	**98%+ committed in writing.** Records below threshold replaced free within 30 days of delivery.
Q4	**Source attribution**	Source tag on every record — proprietary, public, or partner. Included in the delivery audit trail.
Q5	**Left-company check**	Job-change monitoring available. Active client datasets checked on refresh cycle; departed contacts flagged.
Q6	**DPA availability**	Standard DPA on request; we review client-template DPAs. Contact **dpo@scopeb2b.com**.
Q7	**GDPR lawful basis**	**Legitimate interest** with documented LIA. EU data-subject rights supported.
Q8	**Suppression SLA**	Opt-outs honored within **72 hours** across the entire database.
Q9	**Liability**	Standard liability framework in our Terms. Work-for-hire: client owns output. Replacement policy is contractual.
Q10	**Sub-processors**	List maintained and disclosed in the DPA. Available pre-contract on request.
Q11	**Refresh cadence**	Minimum **20% of proprietary database per quarter**. Active client datasets refreshed to spec monthly.
Q12	**CRM delivery**	Direct push to Salesforce, HubSpot, Pipedrive, Zoho, Dynamics. We map to your field schema.
Q13	**Minimum & timeline**	**Custom builds from 500 records.** No minimum for enrichment. Sample in 48–72 hours. Full delivery 5–10 business days.
Q14	**Audit trail**	Source, verification date, QA reviewer tag, compliance flags — **included standard** with every delivery.
Q15	**NDA & references**	NDA as standard. References and case studies available on request.

NEXT STEPS

Ask us all 15 — then ask for a sample.

Every question in this guide has a direct answer from us, in writing, before a sales call. The fastest way to test our claims is to put a sample in front of your team.

01	Share this guide with your procurement and GTM stakeholders.
02	Tell us your ICP — titles, geographies, firmographics, and use case.
03	We scope a free 50-record sample to your exact specification.
04	Review quality and format, then scale — full delivery in 5–10 business days.

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REQUEST A SAMPLE

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