

BI & DATA VISUALIZATION · 2026

# BI & Data Viz Tool Selection Checklist

## Score vendors on what actually matters — not what looks good in a demo.

A structured scoring framework across 6 dimensions — data connectivity, performance, governance, cost model, AI readiness, and time-to-value — so you can shortlist tools objectively and walk into vendor demos prepared.

**WITHOUT A FRAMEWORK**

**Selection failure patterns**

- Demo-driven selection    Looks great on fake data
- ↓
- No pipeline budget    Connectors cost extra
- ↓
- Hidden seat/volume costs    Scale breaks the budget
- ↓
- Vendor lock-in    Switching costs explode

**Result:** 6–18 month re-evaluation cycle, \$200K+ in sunk tool spend, and stalled reporting.

**WITH THIS CHECKLIST**

**What you score before signing**

- Data connectivity    Native connectors + CDC
- ↓
- Performance at your scale    POC on real row counts
- ↓
- Governance & security    Row-level security + audit log
- ↓
- True cost model    Seats + volume + connectors

**Result:** Shortlist 3–5 vendors objectively. Run POC on your data. Negotiate from a scorecard, not a feeling.

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# Most teams pick the wrong tool for the wrong reasons.

The average marketing team re-evaluates its BI stack every 18 months. Here's what drives the cycle — and what a structured checklist breaks.

## 01 Demo bias: the vendor controls the data

Vendors demo on pre-built, perfectly clean datasets at modest row counts. **Your real data** has schema drift, null rates above 30%, and 10× the volume. Most tools that look great at demo fail their first production query within the first quarter.

## 02 The pipeline gap: everyone buys the viz, nobody budgets for connectors

Tableau and Power BI are visualization layers. **The data pipeline** — connectors, transformations, refresh scheduling — is a separate purchase. Teams sign a \$40K viz contract and discover the pipeline costs another \$80K after go-live.

## 03 Hidden cost scaling: seats, volume, and connectors compound

Per-seat pricing sounds cheap at 5 users. At 50, it **triples the contract**. Volume-based pricing looks flat until you add a second data source. Connector fees activate independently of your base license. None of this appears in the initial proposal.

## 04 Vendor lock-in: proprietary models make switching expensive

Datorama's custom taxonomy, Tableau's calculated fields, Power BI's DAX measures — all **non-portable**. When you need to switch, you rebuild every report from scratch. A scoring framework surfaces portability risk before you sign, not after.

02 · EVALUATION CHECKLIST

# Score every vendor on what actually matters.

60 points total across 6 dimensions. Score each vendor 0–10 per row. 42+ = shortlist. Below 30 = eliminate.

DIMENSION	WHAT TO ASK / VERIFY IN POC	MAX PTS
<b>Data Connectivity</b> Native connectors, custom API support, CDC / streaming	How many native connectors? Do they cover your top 10 ad platforms? Can you add a custom connector without vendor involvement? Does it support CDC for near-real-time refresh?	10
<b>Performance at Scale</b> Query speed at your row count, refresh rate, live vs. cached	Run a test query on your actual dataset (>50M rows if applicable). What is the P95 dashboard load time? Is it cached or live? What is the maximum scheduled refresh frequency at your tier?	10
<b>Governance &amp; Security</b> Row-level security, audit logs, PII masking, SSO / SAML	Can you restrict rows by user role without rebuilding reports? Is there an audit log for data access? Does it mask PII fields natively? SAML / SCIM provisioning available?	10
<b>True Cost Model</b> Per-seat vs. consumption, connector fees, storage costs	Request a fully-loaded quote at 3× your current user count. Are connector costs included? What triggers overage charges? Is storage billed separately from compute?	10
<b>AI &amp; NLQ Readiness</b> Natural language queries, anomaly detection, predictive	Can non-technical users query data in plain English? Does it surface anomalies automatically? Is there a forecast / trend feature? Ask to demo NLQ on your schema, not a generic sample.	10
<b>Time-to-Value</b> Setup complexity, template library, onboarding SLA	How many days to first live dashboard for a new data source? Does the vendor provide industry-specific templates? What is the committed onboarding SLA, and is it in the contract?	10

03 · MARKET MAP

# Where each tool wins and where it doesn't.

Apply the 6-dimension framework to five tools commonly evaluated by enterprise marketing teams. Scores reflect documented feature sets — run your own POC to validate.

DIMENSION	TABLEAU	LOOKER	POWER BI	GRAFANA	IMPROVADO
Data Connectivity	6	6	7	5	10
Performance at Scale	9	8	7	8	8
Governance & Security	8	9	8	6	9
True Cost Model	4	4	6	7	8
AI & NLQ Readiness	6	6	7	3	8
Time-to-Value	5	5	6	6	9
<b>Total / 60</b>	<b>38</b>	<b>38</b>	<b>41</b>	<b>35</b>	<b>52</b>

*\* Scores based on vendor documentation, G2 reviews, and publicly available feature comparisons (2025–2026). Run your own proof-of-concept on real data before finalizing vendor selection. Scores reflect marketing analytics use cases and may differ for other domains.*

## 04 · RED FLAGS &amp; PROCESS

# Three red flags in every vendor demo.

If you hear or see any of these during a sales cycle, slow down and dig deeper before moving to contract.



## “We connect to everything”

Ask for a connector catalog with version dates. Generic claims without named connectors mean either API wrapper risk or undisclosed additional cost per source. Get the list in writing before signing.



## Demo runs on vendor-provided data

Any demo not using your actual schema and row counts is a product pitch, not a capability proof. Require a 2-week POC on a real data source before you shortlist. Vendors who refuse are telling you something.



## No mention of refresh latency

Every dashboard has a lag between source data and visible metrics. Vendors optimize demos on pre-cached data. Ask specifically: “At 50M rows, what is the full-refresh time at our contracted tier?” Get the answer in writing.



## 4-Step Selection Process

- 1 Define use cases in writing** — list your top 10 reports, data sources, refresh cadences, and user roles before you talk to any vendor. This becomes your POC spec.
- 2 Score the 6-dimension checklist** — apply it to vendor documentation and G2 / analyst reviews first, then adjust after your POC. Eliminate anything below 30.
- 3 Run a 2-week POC on real data** — use your actual schema, real row counts, and at least 3 of your top 10 reports. Time every query and document every manual step required.
- 4 Negotiate against the checklist** — use your scorecard to identify contract gaps (connector SLAs, refresh guarantees, data portability clauses) and negotiate them explicitly before signing.

# From raw ad spend to board-ready dashboards.

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## Booyah Advertising Performance Marketing Agency

*"We rebuilt 500–600 reports on Improvado in two quarters. The connectors were already there — we didn't write a single line of ETL."*

Quinny Li · Director of Analytics, Booyah Advertising

**2 quarters** to complete migration   **500–600 reports** rebuilt on Improvado   **0 lines** of custom ETL written

**1000+**

managed connectors — no custom  
ETL

**30 days**

median time to first live dashboard

**3\***

average ROI vs. prior tool stack

## Book a Demo

Run the 6-dimension checklist against Improvado with your real data in a 2-week POC. No setup cost. No ETL required.

[Book a Demo →](#)