

## DATA CATALOG EVALUATION FORM

Company/Product:  
 Document Updated:  
 Company contacts:

| COMPANY BACKGROUND       |                                                                                                              |                              |                |        |       |
|--------------------------|--------------------------------------------------------------------------------------------------------------|------------------------------|----------------|--------|-------|
| <b>Facts</b>             | a) Date founded<br>b) Headquarters<br>c) Public or Private?<br>d) Current CEO, CMO, CRO                      | a)<br>b)<br>c)<br>d)         |                |        |       |
| <b>Heritage</b>          | a) Founder CEO<br>b) Founder vision<br>c) Initial use case or problem                                        | a)<br>b)<br>c)               |                |        |       |
| <b>Customer Targets</b>  | a) Target markets? (industry, size)<br>b) Ideal prospect? (pain, size)<br>c) Enterprise or mid-market?       | a)<br>b)<br>c)               |                |        |       |
| <b>Growth</b>            | a) Keys to growth<br>b) Keys to profitability                                                                | a)<br>b)                     |                |        |       |
| <b>Marquee Customers</b> | a) Company names and year landed, if possible<br>b) Customer names, titles, & contact info                   | a)<br>b)                     |                |        |       |
| <b>Other</b>             | a) Other relevant information                                                                                | a)                           |                |        |       |
| COMPANY SCALE            |                                                                                                              |                              | Score          | Weight | Total |
| Row based scores         |                                                                                                              |                              |                |        |       |
| <b>Product Revenues</b>  | a) Annual recurring revenue (in millions)<br>b) Net recurring revenue (%)                                    | a) 10 million<br>b) 82%      | a) 10<br>b) 85 |        |       |
| <b>Product Sales</b>     | a) # of product salespeople<br>b) Direct:indirect sales ratio (Use direct # in score)                        | a)<br>b) 80/20 ratio of      |                |        |       |
| <b>Company Funding</b>   | a) Total funds raised or cash on hand<br>b) # of rounds (1= Seed, 2= A, 3=B, etc. (6= public)                | a)<br>b)                     |                |        |       |
| <b>Facts</b>             | a) # of companyCas offices<br>b) # of employees<br>c) # of full-paying customers<br>d) # of patents granted  | a)<br>b)<br>c)<br>d)         |                |        |       |
| <b>Partners</b>          | a) # of systems integrators                                                                                  | a)                           |                |        |       |
| <b>Other</b>             | a) Other relevant information? (Not scored)                                                                  |                              |                |        |       |
| <b>SCORE</b>             |                                                                                                              | Multiply metrics in all rows |                |        |       |
| MARKETING TRENDS         |                                                                                                              |                              |                |        |       |
| <b>Market Trends</b>     | a) Trends<br>b) Competitors                                                                                  | a)<br>b)                     |                |        |       |
| PRODUCT BACKGROUND       |                                                                                                              |                              |                |        |       |
| <b>Current Product</b>   | a) Product name<br>b) Date first shipped<br>c) Current version & ship date<br>d) Key features in new version | a)<br>b)<br>c)<br>d)         |                |        |       |
| <b>Future Product</b>    | a) Next version & ship date<br>b) Key promised features<br>c) Other relevant information                     | a)<br>b)<br>c)               |                |        |       |
| <b>Product Ecosystem</b> | a) Internal to vendor<br>b) External to vendor<br>c) Other                                                   | a)<br>b)<br>c)               |                |        |       |

|                                                                                                  |                                                                                                                |                                                           |              |               |              |
|--------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------|--------------|---------------|--------------|
| <b>Product Modules</b>                                                                           | a) Key product modules<br>b) Target users by module                                                            | a)<br>b)<br>etc.                                          |              |               |              |
| <b>Architecture</b>                                                                              | a) On premises, hosted, or SaaS<br>b) Cloud platforms<br>c) Data storage<br>d) Application engines<br>e) Other | a)<br>b)<br>c)<br>d)<br>e)                                |              |               |              |
| <b>Performance</b>                                                                               | a) Scalability<br>b) Speed<br>c) Concurrency                                                                   | a)<br>b)<br>c)                                            |              |               |              |
| <b>Pricing</b>                                                                                   | a) Pricing model<br>b) Average starting price<br>c) Average sales price<br>d) Details                          | a)<br>b)<br>c)<br>d)                                      |              |               |              |
| <b>Key Differentiators</b>                                                                       | a) Key differentiators                                                                                         | 1)<br>2)<br>3)<br>4)<br>5)<br>6)<br>7)<br>8)<br>9)<br>10) |              |               |              |
| <b>FUNCTIONALITY</b><br><b>Scoring by category:</b> Superior = 4; Average = 2; Not available = 0 |                                                                                                                |                                                           | <b>Score</b> | <b>Weight</b> | <b>Total</b> |
| <b>Catalog</b>                                                                                   | a) # of metadata connectors<br>b) Types of assets<br>c) Attributes published<br>d) Sample data<br>e) Other     | a)<br>b)<br>c)<br>d)<br>e)                                |              |               |              |
| <b>Discovery</b>                                                                                 | a) # of classifiers<br>b) Statistics published<br>c) Other                                                     | a)<br>b)<br>c)                                            |              |               |              |
| <b>Data Enrichment</b>                                                                           | a) Tagging<br>b) Correlations<br>c) Linking<br>d) Other                                                        | a)<br>b)<br>c)<br>d)                                      |              |               |              |
| <b>Data Observability</b>                                                                        | a) What's monitored<br>b) DO Mechanics<br>c) Separate module?<br>d) Other                                      | a)<br>b)<br>c)<br>d)                                      |              |               |              |
| <b>Automation</b>                                                                                | a) Automation mechanics<br>b) Automation examples<br>c) Other                                                  | a)<br>b)<br>c)                                            |              |               |              |
| <b>Data Privacy &amp; Compliance</b>                                                             | a) Identify PII<br>b) Identify compliance types<br>c) Compliance mechanism<br>d) Alerts<br>e) Other            | a)<br>b)<br>c)<br>d)<br>e)                                |              |               |              |
| <b>Data Access Controls</b>                                                                      | a) DA mechanics<br>b) DA alerts<br>c) Other                                                                    | a)<br>b)<br>c)                                            |              |               |              |
| <b>Lifecycle Management</b>                                                                      | a) LM mechanics<br>b) Scheduling<br>c) Deletion<br>d) Other                                                    | a)<br>b)<br>c)<br>d)                                      |              |               |              |
| <b>Data Governance Portal</b>                                                                    | a) Display elements<br>b) Announcements<br>c) Alerts<br>d) Other                                               | a)<br>b)<br>c)<br>d)                                      |              |               |              |

|                                              |                                                                                                        |                            |  |  |  |
|----------------------------------------------|--------------------------------------------------------------------------------------------------------|----------------------------|--|--|--|
| <b>Business Glossary</b>                     | a) Business glossary module<br>b) Auto-generate glossary terms<br>c) Workflow<br>d) Voting<br>e) Other | a)<br>b)<br>c)<br>d)<br>e) |  |  |  |
| <b>Data Quality</b>                          | a) DQ mechanics (ML or rules)<br>b) DQ displays<br>c) DQ alerts<br>d) Other                            | a)<br>b)<br>c)<br>d)       |  |  |  |
| <b>Policy Management</b>                     | a) Policy mechanics<br>b) Types of policies<br>c) Customizable<br>d) Other                             | a)<br>b)<br>c)<br>d)       |  |  |  |
| <b>Collaboration</b>                         | a) Workflows<br>b) Threaded discussions<br>c) Office integration<br>d) Other                           | a)<br>b)<br>c)<br>d)       |  |  |  |
| <b>Reporting</b>                             | a) Out of the box<br>b) Customizable<br>c) Scheduled<br>d) Forecasts<br>e) Other                       | a)<br>b)<br>c)<br>d)<br>e) |  |  |  |
| <b>Data Queries</b>                          | a) Query mechanism<br>b) Query targets<br>c) Query language<br>d) Other                                | a)<br>b)<br>c)<br>d)       |  |  |  |
| <b>Data Lineage</b>                          | a) Data lineage mechanics<br>b) Data lineage GUI<br>c) Other                                           | a)<br>b)<br>c)<br>d)       |  |  |  |
| <b>Data Provisioning</b>                     | a) DP Mechanics<br>b) Data Marketplace<br>c) Separate module?<br>d) Other                              | a)<br>b)<br>c)<br>d)       |  |  |  |
| <b>Data Marketplace</b>                      | a) DM Mechanics<br>b) Separate module?<br>c) Other                                                     | a)<br>b)<br>c)<br>d)       |  |  |  |
| <b>Third Party Integrations</b>              | a) Number<br>b) Types<br>c) Data catalogs<br>d) Other                                                  | a)<br>b)<br>c)<br>d)       |  |  |  |
| <b>Application Marketplace</b>               | a) Applications<br>b) SDK<br>c) Link<br>d) Other                                                       | a)<br>b)<br>c)<br>d)       |  |  |  |
| <b>Use of Large Language Models</b>          | a) LLM Mechanics<br>b) Impact<br>c) Other                                                              | a) No<br>b)<br>c)          |  |  |  |
| <b>Other Functionality</b>                   | a)<br>b)<br>c)                                                                                         | a)<br>b)<br>c)             |  |  |  |
| <b>Other SCORE</b>                           |                                                                                                        | Add up point values        |  |  |  |
| <b>CUSTOMER COMMENTS</b>                     |                                                                                                        |                            |  |  |  |
| <b>Customers</b><br>(from Contacts above)    | a) Strengths<br>b) Things to improve                                                                   | a)<br>b)                   |  |  |  |
| <b>Consultants</b><br>(from EG or elsewhere) | a) Strengths<br>b) Things to improve                                                                   | a)<br>b)                   |  |  |  |

**NOTES:**