

Date-a-vendor Evaluation playbook #4:



"We Need to Consolidate Providers"

 **The playbook for marketers and RevOps leaders ready to find one partner who does it all.**

You've been seeing a few vendors. Some are great in specific regions. Others fill certain gaps. A couple just... kind of showed up one day and never left.

But now? The spark's gone, the bills are piling up, and it's starting to feel like a situationship.

It's time to DTR (define the relationship). This playbook is here to help you figure out which data provider deserves your long-term commitment—and which ones you need to politely ghost.

Why consolidation matters: Too many situationships, not enough commitment

Managing multiple vendors often leads to:

- Duplicate spend on overlapping contacts
- Inconsistent data quality and formatting across teams
- Workflow friction (manual exports, deduplication, CRM conflicts)
- Disjointed support and inconsistent SLAs

Consolidating can bring:

- Lower total cost of ownership (TCO)
- Streamlined operations and better governance
- Better vendor relationships and service levels

But only if you choose the right vendor to consolidate into.

Are you seeing too many people? Ask yourself:

Do we really need to consolidate?

Maybe. The only way to figure that out is by auditing how many vendors you're currently using, where each is strongest, and how much overlap exists.

If multiple teams are using different tools for similar outcomes - or you're seeing inconsistent data quality - it's time to evaluate consolidation. Look for signs like duplicate contacts, rising costs, or inconsistent CRM enrichment.

What if each vendor has a different strength?

This is common - one provider might be strong in North America, another in EMEA, and a third might be best at enrichment.

In this case, consider whether one vendor can realistically replace the others without compromising key segments. If not, a structured multi-vendor strategy may still be your best option - but it should be intentional, not accidental.

Won't consolidation mean losing flexibility?

Not necessarily. The right vendor should be able to cover your most important regions, personas, and workflows at scale.

Ask for sample data across all your core segments and validate their ability to meet your needs before making the switch. You can also negotiate flexible terms or tiered access for different teams if needed.

Should we consolidate purely to save money?

Cost reduction is a valid reason - but it shouldn't be the only one. The best consolidation moves also simplify workflows, reduce admin effort, and improve data trust across teams.

Focus on total cost of ownership - not just vendor pricing, but also the time and headcount you spend maintaining and validating data across platforms.

✅ Consolidation trade off matrix: Your ex's versus 'the one'

Feature/Focus	Regional Specialist Vendor	Enrichment-Only Vendor	Consolidation-Ready Vendor
Regional Coverage	✅ Strong in one market	⚠️ Limited	✅ Multi-region depth
Persona Depth	⚠️ Narrow focus	✅ Deep by function	✅ Broad + deep
Data Quality	✅ High in region	✅ Very high	✅ Consistently strong
Volume Scalability	⚠️ Limited outside region	⚠️ Often N/A	✅ Delivers at scale

CRM & Tool Integration	⚠ Basic	✅ Batch enrichment	✅ Real-time + batch
Support Model	⚠ Localised or minimal	⚠ Reactive only	✅ Dedicated & centralised
Pricing Flexibility	⚠ Rigid	⚠ Per enrichment/credit	✅ Scalable & flexible
Best For	Deep localisation	CRM enrichment/hygiene	Full-scale GTM consolidation

🎯 Green flags to look out for

In a consolidation scenario, you're looking to:

- Standardise data quality across all GTM teams
- Maintain or improve coverage across key personas and geographies
- Reduce admin, integration, and support overhead
- Achieve better ROI and pricing leverage

Core Metrics to Evaluate:

- Coverage gaps (persona, region, seniority)
- Match rate on known data
- Net-new data volume potential by segment
- Fill rate (email, phone, job title, company info)
- Integration ease and TCO (incl. admin effort)

🔥 How to date your data providers (when consolidating vendors)


If you're consolidating vendors, your evaluation must be broader and more strategic. You're not just comparing products - you're assessing coverage, consistency, and consolidation readiness across all the regions, personas, and use cases your teams rely on.

✅ 1. Audit your current providers

Before you can consolidate, you need to understand what you're working with.

Start by building a clear internal picture of:

- What each vendor covers: Which regions, industries, and personas do they serve best? Is Vendor A strong in North America but weak in APAC? Is Vendor B great for Sales contacts but missing Finance or Product roles?
- Who uses each tool: Are different teams (e.g., SDRs vs. Marketing) using different vendors for different reasons? Understanding usage patterns helps you manage change later.
- Known pain points: What are the recurring complaints about each provider? Common ones include poor mobile data, inconsistent formatting, stale records, and slow support.
- Contract terms: When are renewal dates? Are there auto-renew clauses, minimum usage terms, or exit penalties?
- Costs and usage: What's the spend per vendor? Are you paying per seat, per record, or platform access? Are you getting full value from each?

 *Pro tip: Create a vendor matrix that maps each provider's strengths and weaknesses by ICP dimension - region, persona, seniority, industry. This lets you visualise overlaps and blind spots at a glance.*

2. Run parallel tests across vendors


To evaluate which vendor deserves to be your “source of truth,” you need objective, side-by-side testing. This is your reality check.

Run the same two tests with all current vendors:

- **Known Data Test:**
Enrich a shared list of 500–1,000 verified CRM records with each vendor. These should be accurate, up-to-date contacts across key personas and regions.
 - What you're testing: accuracy, recency, and enrichment completeness
- **Unknown Data Test:**
Provide each vendor with your ideal customer profile (ICP) and ask them to deliver 1,000 net-new contacts by region/persona/industry.
 - What you're testing: coverage, relevance, and scalability

Compare vendors on:

- Match rate (% of known contacts correctly enriched)
- Field-level fill rate (emails, mobiles, titles, company info)
- Bounce rate (use a tool like NeverBounce or send a test campaign)
- Mobile number connect rate (can your SDRs actually get people on the phone?)
- Regional strength: do they perform equally across NA, EMEA, APAC?
- Persona alignment: do they consistently match your Sales, Marketing, and Ops personas?
- Recency: when were records last verified or updated?

 *Bonus insight: Get Sales and Marketing to sanity-check 25–50 records from each vendor. Their gut check often reveals problems no spreadsheet will.*

3. Score for consolidation readiness

Not every vendor is built to handle all use cases. Your chosen vendor needs to do more than win the test - they need to be a viable long-term partner across multiple teams and territories.

Key areas to score:

- **Cross-segment strength:**
Can they consistently perform across all your ICP segments—not just one region or job function?
- **Regional depth:**
If you're consolidating global providers, does this vendor have proven strength in EMEA, APAC, or other markets with complex compliance and sourcing environments?
- **Platform integrations:**
Can they integrate with your CRM (e.g., Salesforce, HubSpot), MAP (e.g., Marketo, Pardot), and sales tools (e.g., Outreach, Salesloft)? Do they offer both batch and real-time enrichment?
- **Pricing flexibility:**
Can they meet or beat your current total spend? Do they offer consolidated pricing for larger volume or multi-region usage? Is their model scalable across teams?

Watch out for:

- Vendors who win on one axis but lose the rest. (e.g., great for North America SDRs, but weak for global Marketing teams.)
- Pricing complexity or hidden costs like high overage fees, API limits, or inflated per-seat charges.
- Admin overhead: Does their platform require manual enrichment? Will you need RevOps or IT to babysit syncs, dedupes, or custom fields?

Jeff Ignacio, Head of GTM Operations at Keystone AI said:

“Consolidation only works if the winning vendor can meet everyone’s needs, not just one team’s. It’s not just about the best match rate - it’s about being the best fit for the business.”

Real-world consolidation test example

Let's say you're the Global RevOps Lead at a mid-to-enterprise SaaS company, supporting Sales and Marketing teams across multiple geographies. Right now, your data stack looks like this:

- Vendor A covers North America
- Vendor B is strong in EMEA
- Vendor C is used only for data enrichment (existing CRM records)

This patchwork setup worked when your team was smaller. But now, you're under pressure to:

- Consolidate costs
- Simplify workflows
- Improve consistency across regions and functions

You need to find out if one provider can cover your entire ICP without sacrificing either quality or scale.

Your ICP

Here's what your Ideal Customer Profile (ICP) looks like:

- Industries: SaaS and Professional Services
- Company size: 200–2,000 employees
- Personas: Demand Gen, Revenue Operations, CMO, CFO
- Regions: US, UK, DACH, Benelux

Your data provider needs to be able to reach these personas and deliver accurate, up-to-date contact info consistently across these territories.

Step 1: Create your known-data benchmark

Start by pulling a list of 750 known-good contacts from your CRM. These should include:

- A representative mix of regions (US, UK, Germany, Netherlands, Belgium)
- A variety of personas and seniorities (Marketing, Ops, and Finance leaders)
- Records that have been recently validated by Sales or used in successful campaigns

Why this matters: This is your trust baseline. It allows you to test how well each vendor can enrich records that you already know are accurate.

Step 2: Request parallel enrichment + net-new samples

Send the same test brief to each vendor, including the same known contact list and a request for net-new data.

Ask for:

- Enrichment of the 750 known-good records
 - Business email

- Direct dial or mobile
- Job title
- Company name, industry, and employee band
- Last verified or last updated date
- 1,000 net-new contacts that match your ICP across:
 - All four target regions
 - The four ICP personas
 - Company sizes 200–2,000 employees

Ensure each vendor tags the records by:

- Region
- Persona
- Seniority level
- Industry

Why this matters: You're testing both sides of the equation—accuracy on known data, and coverage across your full ICP.



Step 3: Score vendors on key metrics: Could you actually see a future with them?

Build a side-by-side scorecard to compare performance across vendors. Key metrics to track:

Metric	What to Measure	Why It Matters
Known match rate	% of CRM records that could be enriched	Tests enrichment capacity
Field fill rate	% of contacts with complete email, phone, title, company data	Tests usability
Email bounce rate	% of bounces in a test email send to net-new sample	Tests deliverability and recency

Mobile coverage	% of net-new records with mobile/direct dial, especially for SDR-use personas	Tests outreach potential
Last verified/updated	Presence and recency of this field	Indicates data freshness
Persona/region breakdown	% of net-new records per geo and persona	Reveals strength and blind spots

Bonus tip: Ask SDRs or Marketing to sanity-check 50 contacts from each vendor. Are job titles accurate? Would they reach out?

Step 4: Map results to your ICP heatmap

Are they your forever match – or just regionally compatible?

Now take the test results and overlay them onto your existing ICP heatmap:

- Did any vendors under-deliver in DACH or Benelux?
- Who had better C-level coverage in the UK?
- Did any provider over-index on Marketing personas but underperform for Finance or RevOps?

This heatmap view helps you quickly identify:

- Gaps in geographic coverage
- Weaknesses in persona depth
- Risks in over-reliance on certain vendors for specific roles or regions

What this tells you

From here, you can make a data-backed decision on consolidation:

- If one vendor outperforms across both known and unknown data sets - and covers all your geos and personas - you have a consolidation-ready candidate.
- If no single vendor clears the bar, you might stick with a dual-vendor model - but now with clearer rules of engagement (e.g., Vendor A = US + Marketing; Vendor B = DACH + Finance).

- If your current vendors are *all* underperforming in different areas, it's time to go to market with a fresh shortlist.

Adam Thompson, CPO at Cognism, said:

“You can’t consolidate based on gut. Test vendors side-by-side using the segments that matter. That’s the only way to avoid trading one blind spot for another.”

? Key questions to ask vendors: Ask before you move in together

When you're exploring vendor consolidation, you're not just buying data - you're betting on one provider to replace the strengths of several. That means your questions need to go beyond surface-level capabilities. You need to test breadth, consistency, and reliability across your entire go-to-market motion.

Use these questions to pressure-test whether a vendor can truly become your primary or sole data provider.

1. Can you support all our core personas and regions at scale?

Why it matters:

Most vendors are strong in certain territories or roles, but weak elsewhere. If you're consolidating, the replacement vendor must cover everything your business needs - across personas, job levels, geographies, and industries.

What to look for:

- Evidence of strength in your key ICP segments (e.g., C-levels in SaaS, Marketing Ops in EMEA)
- A clear breakdown of coverage by *region* and *persona*
- Willingness to provide persona-specific volume estimates
- Support for niche roles (e.g., Product Ops, Procurement) and multilingual markets

2. What volume can you deliver monthly per segment?

Why it matters:

Consolidation only works if your new vendor can sustain the flow of data you previously sourced from multiple places. This question helps you understand delivery consistency - not just one-off volume.

What to look for:

- Monthly delivery estimates by region and persona (not just global totals)
- Any caps based on credit usage, seat limits, or territory

- Ability to handle surge requests (e.g., campaign launches, GTM expansions)
- Performance in both known and unknown data supply

3. Do you offer pricing flexibility for vendor replacement?

Why it matters:

Replacing multiple vendors often means you're consolidating spend as well as data. A strong vendor will offer pricing that reflects the value of being your single source - and flexibility to scale with you.

What to look for:

- Discounted tiers or enterprise packages for full-platform adoption
- Clear and transparent pricing (no hidden enrichment, platform, or export fees)
- Scalable pricing aligned to your usage—not rigid seat-based billing
- Bundles for both net-new delivery and enrichment

4. How do you ensure consistency across segments?

Why it matters:

When multiple teams rely on the same vendor, consistency matters. Sales needs mobile numbers. Marketing needs clean titles and segmentation. Ops needs CRM enrichment and deduplication. Your vendor must deliver uniform, reliable data across all functions.

What to look for:

- Consistent fill rates and match accuracy across job functions and regions
- Clear documentation on data sourcing, validation methods, and enrichment logic
- Support for field-level mapping to ensure alignment with your systems
- Dedicated CSM or onboarding support for custom workflows

Antoine Cornet, Head of RevOps at Cognism said:


"Don't just ask what they can do - ask what they'll replace. The best vendor wins more than just the deal - they earn the right to be your single source of truth."

What success looks like (and how to measure it)

When vendor consolidation is successful, it doesn't just reduce cost - it improves how your GTM engine operates across Sales, Marketing, and RevOps. The key outcomes? Clean data, consistent processes, fewer tools to manage, and a confident, aligned team.

Here's how to know if your consolidation strategy is working - and how to prove it.

 KPI framework for consolidation success

KPI	Why It Matters	Target Benchmark
Match rate (known data)	Validates the new vendor's enrichment quality using trusted CRM records.	> 90%
Fill rate (key fields)	Measures completeness across enriched and net-new contacts (email, phone, title).	> 85%
Bounce rate (net-new)	Critical for assessing the health and deliverability of the vendor's database.	< 3%
Coverage (persona + geo)	Tests whether the vendor can truly replace others in each of your target segments.	 Full ICP coverage
TCO reduction	Consolidation should reduce overall spend and vendor management overhead.	> 15–30% annual savings
Admin effort	Fewer vendors = less time spent cleaning, enriching, or troubleshooting data issues.	Significant reduction in hours

Rep/Marketing feedback	If users trust and use the data, it's a strong indicator of success.	Positive sentiment + adoption
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Bonus metrics to track

If you want to go deeper and build a longer-term success narrative, include these additional metrics in your post-consolidation review:

SLAs met across geos

Evaluate whether the vendor delivers consistent performance across all covered regions. This is especially important if you previously relied on region-specific providers.

- Are support and data refreshes happening on time in all territories?
- Does coverage remain strong in historically underserved areas (e.g. DACH, Benelux, APAC)?
- Track resolution time for support tickets or data requests by region.

Lead routing accuracy post-enrichment

Consolidation should streamline lead handoff between Marketing and Sales - not create new friction.

- Are leads being routed to the right SDRs/AEs based on accurate region, persona, and title data?
- Has manual lead rerouting or requalification decreased?
- Bonus: Set up a QA dashboard that flags routing exceptions caused by missing or incorrect fields.

CRM field consistency across teams

With one vendor enriching your records, you should see cleaner, more consistent data across functions.

- Are field values (e.g., job title, department, seniority) aligned across Sales, Marketing, and Ops views?
- Is segmentation (by persona, region, company size) easier to run and more accurate?
- Are picklists and scoring rules working better due to clean input data?

Antoine Cornet, Head of RevOps at Cognism, said:

“Consolidation success isn’t just cheaper - it’s smoother. Your CRM feels lighter. Sales asks fewer questions. Marketing launches faster. That’s when you know it worked.”

Final takeaways: When you know, you know

If you’re consolidating providers:

- Audit your stack and map gaps/overlaps clearly
- Test all vendors side-by-side with identical samples
- Choose based on ICP match, not just contract savings
- Track performance across quality, coverage, and usability

With the right approach, consolidation isn’t just about saving money—it’s about strengthening your entire GTM engine.