

— INSTALLED BASE INTELLIGENCE SERIES

The Installed Base Data Buyer's Guide

12

QUESTIONS

12 questions to ask before you buy a technology users list,
and the answers that separate real data from labeled lists

PROVIDER SCORECARD

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Is it real?
Is it current?

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WHO THIS IS FOR

Marketing, sales, RevOps, partnerships, and procurement leaders evaluating a technology users list or installed base data provider, whether for the first time or for a renewal.

INTRODUCTION

Why this guide exists

Almost every technology users list looks the same on a sales call: big record counts, impressive logos, and a promise that the data is fresh. The difference shows up three weeks into the campaign.

By then, the bounces have arrived, reps have opened with the wrong platform, and the budget is spent. Buyers rarely get a second chance to evaluate a list after it has gone wrong, which is why the evaluation has to happen before the purchase.

76%

of CRM users say less than half of their CRM data is accurate and complete

37%

say their company loses revenue directly from poor data quality

~22.5%

of B2B contact data decays every year, before technology changes are counted

59%

of software buyers regret at least one purchase in the past 18 months

This guide gives you the 12 questions we would ask any provider, including us, before buying installed base data. Each one comes with what a good answer sounds like, the red flag to listen for, and a follow-up that exposes vague answers.



A good provider welcomes these questions. A weak one changes the subject to record counts.

GETTING STARTED

How to use this guide

The 12 questions are grouped into four sections. Ask all 12 of every provider on your shortlist, in writing if you can, and score each answer on the scale below. The printable scorecard on page 14 keeps up to three providers side by side.

A Is the technology data real?

Questions 1 to 3

B Is it current?

Questions 4 to 6

C Does it fit my market?

Questions 7 to 9

D Will it reach the right people?

Questions 10 to 12

SCORING EACH ANSWER

0

No answer, or a red flag

1

Vague or marketing-level answer

2

Specific, credible answer

3

Specific answer, backed by evidence you saw

THE RULE

Never score above 1 for an answer you haven't seen proven. Claims are cheap; samples are not.

SECTION A



Is the technology data real?

The first four questions test the claim at the heart of any technology users list: that each account actually runs the technology listed. Weak answers here make everything else irrelevant.

“ If the technology record isn't real, every message built on it is wrong. A displacement pitch to an account that never ran the competitor costs credibility, not just a touch.

01 How do you confirm that an account actually uses a technology?

Methods range from multi-source research to scanning website code. A script on a web page can't tell a trial from a deployment, or show a tool that was removed last year.

✓ WHAT GOOD LOOKS LIKE

Names its sources and method for each technology category, and can explain how confident each record is.

× RED FLAG

"Proprietary AI" with no explanation, or one detection method applied to every category.

FOLLOW-UP *"Show me how one specific record in my sample was confirmed."*

HOW TO TEST IT

Pick five accounts from a sample and ask for the evidence behind each technology record.

3 Documented sources per record, shown on request

0 No method described, or "proprietary" only

02 Can you see back-office and on-premises systems?

ERP, EHR, core banking, mainframe, and on-premises infrastructure rarely leave a trace on a public website, yet they anchor most enterprise technology deals.

✓ WHAT GOOD LOOKS LIKE

Specific coverage of the systems you sell around, with a clear explanation of how those accounts were found.

× RED FLAG

Coverage dominated by marketing, analytics, and web tools, with little on core systems.

FOLLOW-UP *"How many accounts do you have for our core system, and how were they identified?"*

HOW TO TEST IT

Ask for counts on your core system, plus results for three accounts you know run it.

3 Strong counts and correct results on your known accounts

0 Little or no coverage of core systems

03 Can you tell versions, modules, and deployments apart?

SAP ECC versus S/4HANA, on-premises versus cloud, or Data Center versus Cloud can turn the same vendor name into completely different opportunities.

✓ WHAT GOOD LOOKS LIKE

Version, module, or deployment detail wherever it changes the opportunity.

× RED FLAG

Every record rolled up to a vendor name, such as "uses SAP" or "uses Atlassian."

FOLLOW-UP *"Can you separate ECC accounts from S/4HANA accounts in my target market?"*

HOW TO TEST IT

Request a split count by version or deployment for your main platform.

3 A clean split with clear definitions

0 Vendor-level records only

SECTION B

B

Is it current?

Technology data decays twice: when people change jobs and when companies change systems. These questions test whether a provider manages both clocks.

~2.1%

of B2B contact data decays every month, by the most widely cited estimate

211

SaaS renews the average organization manages a year, each one a chance to switch platforms

04 When was each record last validated?

Contact data decays at roughly 2.1% a month, and technology records change with every renewal and migration. Age is the single best predictor of accuracy.

✓ WHAT GOOD LOOKS LIKE

A validation date on every account and every contact, filterable before purchase.

× RED FLAG

"Our database is updated regularly," with no date attached to any record.

FOLLOW-UP "What share of my list was validated in the last 90 days?"

HOW TO TEST IT

Ask for the spread of validation dates across your sample.

3 A date on every record, most of them recent

0 No dates available

05 How do you catch migrations and replacements?

The accounts most likely to be wrong are the ones that just switched platforms, and they are often exactly the accounts a displacement campaign targets.

✓ WHAT GOOD LOOKS LIKE

A described process for revalidating technology and removing accounts that left a platform.

× RED FLAG

Records are added over time but never removed when an account switches.

FOLLOW-UP *"How would you know that an account left this platform last quarter?"*

HOW TO TEST IT

Include two accounts you know switched platforms in your sample.

3 Both switches correctly reflected

0 The old platform still listed

06 Will you revalidate on my campaign cadence?

A migration or displacement campaign needs fresher data than a market-sizing exercise. One annual file can't serve both.

✓ WHAT GOOD LOOKS LIKE

Refreshes available before key campaigns, with clear turnaround times.

× RED FLAG

One static file a year, or refreshes that cost as much as a new purchase.

FOLLOW-UP *"What does a refresh cost, and how quickly can you deliver it?"*

HOW TO TEST IT

Ask for refresh pricing and turnaround in writing.

3 Refresh options aligned to your campaign calendar

0 An annual static file only

SECTION C



Does it fit my market?

An accurate list of the wrong accounts is still the wrong list. These questions test whether the audience can be shaped around your ICP before you pay.

“ Every account outside your ICP is budget spent on a deal you were never going to win. Fit has to be built in, not filtered out.

07 Can you build the audience around my ICP, or is it a fixed file?

Buying a large technology list and filtering it yourself means paying for accounts you will never work.

✓ WHAT GOOD LOOKS LIKE

A custom build from your technology, industry, size, region, and role criteria.

× RED FLAG

"Buy the full list and filter it after purchase."

FOLLOW-UP *"Can you build the audience from our ICP definition before we commit?"*

HOW TO TEST IT

Send your ICP definition and ask for a build plan before pricing.

3 An audience built from your criteria, with counts

0 A fixed file only

08 Can you combine and exclude technologies?

The best audiences are defined by combinations: runs Salesforce and NetSuite, or runs a competitor but not our integration partner.

✓ WHAT GOOD LOOKS LIKE

And, or, and not logic across technologies, versions, and firmographics.

× RED FLAG

One technology per list, with any combinations left for you to build.

FOLLOW-UP "Can you give me accounts on platform A and platform B, excluding platform C?"

HOW TO TEST IT

Ask for one "and," one "or," and one "not" combination count.

3 All three delivered, with the logic explained

0 Single technology only

09 Can you show counts before I buy?

Counts by segment reveal whether the audience is big enough, and whether it was actually built for you, before money changes hands.

✓ WHAT GOOD LOOKS LIKE

Free counts by technology, industry, size, and region, with the logic behind them.

× RED FLAG

Pricing before counts, or counts that shrink after purchase.

FOLLOW-UP "Can you break the count down by segment so we can size each campaign?"

HOW TO TEST IT

Request counts by segment before any pricing discussion.

3 Free, segmented counts with the logic shown

0 No counts before contract

SECTION D



Will it reach the right people?

Accounts are only half the value. These questions test whether you will reach real, current people across the buying group.

37%

of CRM users say their company loses revenue directly from poor data quality

76%

say less than half of their CRM data is accurate and complete

10 How are contacts verified before delivery?

With 37% of CRM users reporting lost revenue from poor data, unverified contacts hurt more than reply rates. Bounces also damage sender reputation.

✓ WHAT GOOD LOOKS LIKE

A stated verification method applied to every order, plus a clear policy for records that bounce.

× RED FLAG

Verification left to your team, or no stated policy on bounces.

FOLLOW-UP *"What happens to records that bounce after delivery?"*

HOW TO TEST IT

Ask for the verification method and bounce policy in writing.

3 A stated method plus a written bounce policy

0 Verification left to you

11 Which roles do you cover around each technology?

Platform owners, admins, business owners, architects, and finance all shape technology purchases. One contact per account reaches a fraction of the buying group.

✓ WHAT GOOD LOOKS LIKE

Coverage across the people who own, operate, fund, and secure the technology.

× RED FLAG

One generic "decision-maker" per account, regardless of the system.

FOLLOW-UP *"Which titles would you include for accounts running our core platform?"*

HOW TO TEST IT

Ask which titles they would include for your core platform.

- 3** Owners, operators, and budget holders all covered
- 0** One contact per account

12 Will you test against accounts I already know?

Your own customers are the perfect answer key. A provider confident in its data will welcome being measured against them.

✓ WHAT GOOD LOOKS LIKE

Readily matches a sample of your known customers and shares the results openly.

× RED FLAG

Reluctance to be tested, or a test run only on accounts the provider picks.

FOLLOW-UP *"Here are 50 customers whose stack we know. What do you show for them?"*

HOW TO TEST IT

Send the 50-account sample described on page 15.

- 3** Results returned openly against your answer key
- 0** Refuses, or picks its own accounts

QUICK REFERENCE

Ten red flags to walk away from

If you hear any of these on a sales call, push for specifics. If you hear three or more, keep looking.

- 1

"Our database is updated regularly."
No validation dates means no way to know which records are stale.
- 2

"Our proprietary AI detects what companies use."
A method you can't inspect is a method you can't trust.
- 3

"We have 50 million records."
Volume is not relevance. Ask how many fit your ICP.
- 4

"Just filter the list after purchase."
You will pay for accounts you never use.
- 5

"Verification is your responsibility."
Bounces and complaints then land on your sender reputation.
- 6

"We cover every technology."
Breadth usually means thin coverage of the systems that matter most.
- 7

"We provide one decision-maker per account."
Technology buying groups are much larger than one person.
- 8

"Counts are available after you sign."
You can't size a campaign, or check the build, without them.
- 9

"We don't do tests on customer accounts."
Your known customers are the fairest test there is.
- 10

"The account uses SAP."
Without version or deployment detail, the record can't support a real campaign.

PRINTABLE

The provider scorecard

Score each provider 0 to 3 on every question, using the scale on page 4. Section letters show where each question comes from.

QUESTION	Provider A	Provider B	Provider C
01 A How is usage confirmed?			
02 A Back-office and on-premises coverage			
03 A Versions, modules, deployments			
04 B Validation date per record			
05 B Catching migrations and replacements			
06 B Refresh on your cadence			
07 C Built around your ICP			
08 C Combine and exclude technologies			
09 C Counts before purchase			
10 D Contact verification			
11 D Role coverage			
12 D Test on known accounts			
Total out of 36			

READING THE TOTAL (OUR GUIDANCE)

30 to 36

Strong evidence across the board. Move to a pilot.

20 to 29

Promising, with gaps. Pilot only the sections that scored well.

Under 20

Too many unproven claims. Keep looking.

BEFORE YOU BUY

Running a 50-account pilot

Answers on a call are a starting point. A pilot shows you what the data actually looks like. This is the simplest, fairest test we know, and it takes days, not months.

1

Pick 50 accounts you know

Choose customers and lost deals whose technology and key contacts you can confirm yourself.

2

Set pass marks before you look

Agree internally on the match rate you need for technology, contacts, and roles. Write it down.

3

Send the same sample to every provider

Identical input makes results comparable. Don't reveal which accounts are customers.

4

Score technology, version, and contacts separately

A provider can be strong on accounts and weak on people, or the reverse.

5

Then pilot a small live campaign

Run one segment through a real sequence and compare bounces, replies, and meetings to your baseline.

YOUR PASS MARKS

Technology match	[your pass mark]
Version or deployment match	[your pass mark]
Contact still in role	[your pass mark]
Deliverable email	[your pass mark]

WHY SET MARKS FIRST

Deciding what "good" means after you see the results makes every provider look acceptable. Fix the bar before the data arrives.

CHECKLIST

Are you ready to buy?

The best answers from a provider are only useful if you know what you need. Work through this checklist with marketing, sales, and RevOps before the first vendor call.

☐

Name the technologies

Which platforms do you integrate with, replace, or complement? Include versions where they matter.

☐

Write down your ICP

Industries, company sizes, regions, and any exclusions such as current customers.

☐

List the buying roles

The titles that own, operate, fund, and secure the technology you sell around.

☐

Define the use case

Displacement, integration-led, migration, ABM, partner co-sell, or events. Each needs different data.

☐

Decide your refresh needs

How often will this audience be used, and how fresh must it be each time?

☐

Agree on success metrics

Bounce rate, reply rate, meetings, and pipeline you'll measure against your current data.



Teams that arrive with a clear ICP and technology list get better counts, better pricing, and better data.

DATA INFOMETRIX

How we answer the 12 questions

Data InfoMetrix specializes exclusively in Installed Base Data and Installed Base Intelligence. We wrote this guide because we'd rather be evaluated on these questions than on record counts. Here is how we approach each section.

A**Is the technology data real?**

Technology usage is researched across multiple sources for each order, with particular attention to back-office and on-premises systems.

B**Is it current?**

Audiences are researched when you order rather than pulled from an aging file, and can be revalidated before each campaign.

C**Does it fit my market?**

Every audience is built around your ICP, technology combinations, and exclusions, with counts and a quote before you commit.

D**Will it reach the right people?**

Contacts are verified before delivery, across the roles that own, operate, and fund the technology.

Put us through all 12 questions

Send us your questions, your ICP, or a sample of accounts you already know, and get counts and a quote. One of our experts will respond within one business day.

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FAQ

Frequently asked questions

What is a technology users list?

A list of organizations, and the contacts within them, that use a specific technology such as a particular ERP, CRM, cloud platform, or EHR system. It is also called installed base data.

Are bigger databases better?

Not for technology targeting. A smaller audience built around your ICP, with confirmed usage and verified contacts, usually outperforms a larger generic file.

What is the 50-account pilot?

Sending each provider 50 accounts you already know, then scoring how accurately they return technology, versions, and current contacts.

Can web-detected technographics replace installed base data?

For web and marketing tools, often. For ERP, EHR, core banking, and on-premises systems, website detection rarely sees enough.

What is the most important question to ask a provider?

How technology usage is confirmed. If the method is weak, every other strength of the list is built on a guess.

How fresh should installed base data be?

Fresh enough for the use case. Migration and displacement campaigns need data validated close to launch; market sizing can tolerate older records.

Should I ask for counts before buying?

Always. Counts by segment show whether the audience is large enough and whether it was built for your ICP.

How do I use this guide with procurement?

Send the 12 questions in writing, attach the scorecard, and require a pilot before contract. It keeps the evaluation objective.

REFERENCES

Sources

Statistics in this guide link to the pages they were taken from. The scoring scale, total bands, and pilot process are Data InfoMetrix guidance, not published benchmarks.

- 1 [Validity: The State of CRM Data Management in 2025](#)
- 2 [Airscale: B2B contact data decay evidence \(HubSpot and MarketingSherpa estimate\)](#)
- 3 [Gartner Digital Markets: 2025 Software Buying Trends](#)
- 4 [Gartner: 12 Actions to Improve Data Quality \(via Verato\)](#)
- 5 [Le Monde Informatique: Gartner ECC to S/4HANA migration tracking](#)
- 6 [Zylo: SaaS statistics and 2026 SaaS Management Index](#)

MORE FROM THE INSTALLED BASE INTELLIGENCE SERIES

Beyond Firmographics (eBook) • The Migration Wave • The Compatibility Economy • Technology Data Decays Twice • Ecosystem-Led Growth (white papers)

NEXT STEP

Ask better questions. Buy better data.

Tell us which technologies and ICP matter to your next campaign. We'll answer all 12 questions, show you counts, and build a verified installed base audience around them.

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