

# Demo Validation Checklist

Use this during any loyalty platform vendor demo — including Clutch's.

## Technical architecture & POS integration

- Send your full POS inventory in advance. Require written confirmation of native, certified integration per system — not a roadmap commitment.
- Ask for API documentation before the demo. If the vendor can't provide it, the platform isn't truly API-first.
- Ask the vendor to demo offline transaction handling — what happens to loyalty data when a POS loses connectivity mid-transaction.

## Platform reliability

- Request actual uptime logs or a third-party monitoring report for the past 12 months — not just the stated SLA target.
- Ask whether SLA breaches trigger automatic credits or require client escalation. The two are meaningfully different.

## Data ownership & CDP

- Ask the vendor to demo identity resolution live: submit two records with partial overlap and watch the merge logic.
- Confirm in writing whether your data is used to train shared models across other clients, and whether you can opt out.

## Loyalty program logic

- Ask the vendor to configure, live, a rule like: 'earn 2x points on Category A, weekdays 6–9pm, Gold members only.'
- Then ask how the platform resolves stacking when two promotions apply to the same transaction simultaneously.

## Stored value & gift cards

- Ask for a live walkthrough of the full gift card lifecycle: purchase, balance check, partial redemption, liability report, and escheatment report.
- Request a sample stored value liability report from a current client — one your CFO could use without modification.

## Offer management & AI

- Ask for a written list of which AI features are live in production today versus on the roadmap, with reference customers for anything marked live.
- Ask directly: does your AI train on shared data across clients, or exclusively on our data?

## Marketing automation

- Ask the vendor to build a 3-step triggered campaign live, in the UI, as a business user with no engineering support.

## **Enrollment experience**

- Time the POS enrollment flow live, with no smartphone. If it exceeds 90 seconds, ask why.

## **Finance-ready reporting**

- Ask for a live incremental lift report and a discount efficiency report — not a screenshot, and not a leave-behind deck.

## **Implementation & migration**

- Ask for the median implementation timeline across the vendor's last 5 comparable clients, with a phase-by-phase breakdown.
- If migrating from an existing platform, ask for two references who completed a similar migration in the past 18 months.

## **Commercial terms**

- Request the complete written fee schedule before the demo ends — base fee, per-location, per-member, transaction, API, and communication fees.
- Ask about auto-renewal notice windows, performance-based exit rights, and change-of-control provisions before the contract stage, not during it.