

The eDiscovery Demo Day Checklist

Twenty live proofs, every evasion tell, and one score per vendor, all on a sheet you can print. Use the identical checklist for every finalist so the sessions stay comparable.

Vendor _____

Date _____

Your driver _____

Evaluator _____

Before the demo

☐ Sent two or three anonymized scenarios with data types, volumes and deadlines.	☐ Sent the identical scenario pack and sample data to every finalist.
☐ Flagged this vendor's two weakest written RFP sections for a live response.	☐ Named our driver for the hands-on segment, our least technical daily user.
☐ Capped slides at ten minutes and reserved ten minutes for unscripted asks.	☐ Agreed the 0 to 2 scoring scale below before the first session ran.

💡 SCORE EACH ASK

- 2 — proved live on realistic data
- 1 — shown partially or only on canned data
- 0 — described, deferred, or declined

#	Watch this happen on screen	Live?	Score	Notes
Processing on real data				
1	Mixed, realistic sample processed live, current job metrics visible while it runs.	Y / N		
2	Exception report opened; corrupt, protected and unsupported files remediated on screen.	Y / N		
3	Slack or Teams export rendered as readable threaded conversations, not one-line fragments.	Y / N		
4	One custodian traced from collection to review without the data leaving the platform.	Y / N		
Review, AI and TAR under stress				
5	TAR or predictive coding run on a sample; recall and elusion numbers shown, not adjectives.	Y / N		
6	Reviewer override of an AI call demonstrated, logged, and fed back into the model.	Y / N		
7	Native AI features separated from third-party plugins, with the boundary demoed.	Y / N		
8	Spreadsheet and chat thread redacted natively, with no conversion to images.	Y / N		
9	One document walked from privilege flag to log entry to blocked production.	Y / N		

#	Watch this happen on screen	Live?	Score	Notes
Security in two minutes				
10	Complete audit trail for one document pulled live in under two minutes.	Y / N		
11	Outside-counsel user created now, scoped to one matter, permissions shown.	Y / N		
12	Cloud, on-premises and hybrid configuration shown as one identical product.	Y / N		
Usability with your team driving				
13	Our least technical user drove a review batch, searching, tagging and redacting, uncoached.	Y / N		
14	Clicks counted from loaded data to first search, then for a routine production.	Y / N		
15	Someone other than the sales engineer performed the same task at normal speed.	Y / N		
16	Day one shown for a new user, the default screen and the help resources.	Y / N		
Cost mechanics				
17	The session we just watched priced as line items on the vendor's own model.	Y / N		
18	Included features separated from separately metered features, pointed out on screen.	Y / N		
The unscripted ten minutes				
19	An unrehearsed item from our scenarios handled now, with no deferral to a follow-up.	Y / N		
20	The question of what buyers regret not asking answered without deflection.	Y / N		

After the session, score it while it is fresh

Complete this page within an hour of the demo ending, before the sessions start to blur. Collect every evaluator's sheet immediately and total the scores per vendor.

💡 EVASION TELLS OBSERVED

Tick every behavior you see. Three or more ticks is a pattern, not a coincidence.

☐ Throughput claims quoted with nothing actually running on screen.	☐ Exception handling explained but never once shown.
☐ AI demoed only on the vendor's own data, no pilot offered on ours.	☐ Validation delivered in adjectives instead of numbers.
☐ Hard questions consistently answered with the product roadmap.	☐ Visible reluctance to hand our team the keyboard.
☐ Requests met with, we would configure that for you first.	☐ Pricing questions deferred to a different team entirely.
☐ Unscripted asks pushed into follow-up sessions.	☐ Only the demo driver could make the platform look easy.

Walk-away red flags Any single one of these is a complete answer in itself.

☐ Refused to demo our scenarios or touch realistic data.	☐ Our team was never allowed to drive.
☐ No trial, sandbox or proof of concept offered to finalists.	☐ Nothing shown could be connected to a price in the room.

Session summary

Total score, out of 40	
Asks proved live, out of 20	
Strongest live proof we watched	
What they would not show	
Advance to proof of concept? Y / N	

 COMPARE YOUR FINALISTS

Carry each vendor's category scores here once every session is done.

Category	Vendor A	Vendor B	Vendor C
Processing, out of 8			
Review and AI, out of 10			
Security, out of 6			
Usability, out of 8			
Cost mechanics, out of 4			
Unscripted minutes, out of 4			
Total, out of 40			
Evasion tells ticked			
Red flags observed			

Next steps

- ☐ Ask your top one or two vendors for a proof of concept on your own sample data. The list of things a vendor would not show usually decides more than the strengths.
- ☐ Book follow-up sessions only for gaps your team chose to explore, never for gaps the vendor deferred. A deferral that returns as a slide deck has already answered the question.
- ☐ Treat any walk-away red flag as final. A vendor who hides in a supervised demo will not become more transparent after the contract is signed.

A CHECKLIST IS ONLY AS GOOD AS THE DEMO

Put this sheet to work on a platform built to be tested live.
See processing, review and pricing proved on screen, not described.

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