

YASH BHATT CONSULTING

AI Vendor Evaluation Checklist

40 questions to ask before signing with any AI or analytics vendor.

How to Run the Evaluation

Send this checklist to shortlisted vendors before demos, then use the demo to verify - not discover - answers.
Weight sections by your context: regulated industries should double the governance section.

Capability & Fit (1-8)

- Which of our specific use cases have you deployed at companies our size?
- Can we speak to two reference customers in our industry?
- What does your product NOT do well? (Silence here is a red flag.)
- How does the product handle our data formats and volumes today?
- What is the typical time-to-first-value, measured, not promised?
- Which parts of the demo are production features vs. roadmap?
- What happens when the model is wrong? Show the correction workflow.
- How do you measure output quality, and can we see those dashboards?

Data & Security (9-18)

- Is our data used to train shared models? Get it in writing.
- Where is data processed and stored (regions, subprocessors)?
- SOC 2 Type II / ISO 27001 status - request the actual reports.
- How is data deleted at contract end, and how is deletion evidenced?
- What PII handling and redaction capabilities exist?
- Role-based access controls - granularity and audit logs?
- Which foundation models power the product, and can they change without notice?
- What is your incident response SLA and disclosure policy?
- Can we bring our own keys / models if needed later?
- Penetration test cadence and most recent results?

Integration & Architecture (19-26)

- Native connectors for our stack (Tableau, Power BI, CRM, data warehouse)?
- API coverage: can everything in the UI be done via API?
- Webhooks / event streams for downstream automation (e.g. n8n)?
- SSO/SCIM support included or a paid tier?
- Rate limits and how they behave at our projected volume?
- Sandbox environment for testing before production changes?
- Export paths: can we get all our data and configurations out?
- MCP or comparable agent-integration support on the roadmap?

Commercials & Viability (27-34)

- Pricing model: what causes cost to grow, and what caps exist?
- Usage-based components - historical variance across customers?

- What is included in support vs. paid services?
- Implementation cost estimate with assumptions documented?
- Contract flexibility: ramp schedules, exit clauses, renewal caps?
- Funding runway / profitability - viability for a 3-year commitment?
- Product roadmap governance: how do customer requests get prioritized?
- What percentage of revenue is from companies like ours?

Governance & Success (35-40)

- Responsible AI policy: bias testing, human-in-the-loop options?
- Explainability: can outputs be traced to sources (citations, lineage)?
- Admin controls to restrict model behavior by team or data class?
- Named customer success manager or pooled support?
- Joint success plan with measurable 90-day outcomes?
- Quarterly business reviews with usage and value reporting?

Scoring & Decision

Score each answer 0-2. Disqualify on any zero in Data & Security for regulated data. Between close scores, weight Integration & Architecture highest - switching costs live there. For an independent, vendor-neutral evaluation of your shortlist: calendly.com/yash121r/30min