# AI vendor check card

Fill in one card for each vendor on your short list. Fill in what you know; every blank line gets an owner and a date. Any blank line means: not ready to sign.

| QUESTION | ANSWER | OWNER / BY WHEN |
|---|---|---|
| Vendor, and what it would do for us | | |
| Who owns the check (role) | | |
| Reviews read by the owner? (yes / no) | ☐ Yes ☐ No | |
| Batch of your own real work run through it, outputs compared? (yes / no) | ☐ Yes ☐ No | |
| Trial on your work agreed, beyond the vendor's demo? (yes / no) | ☐ Yes ☐ No | |
| Pass mark for the trial, written before it starts | | |
| Exit trigger for the trial, written before it starts | | |
| How much feeding it took, and what that did to the verdict | | |
| Vendor's stage (seed / Series A / Series B), and the reference calls it sets | | |
| Reference questions written once, before the first call? (yes / no) | ☐ Yes ☐ No | |
| What references said: value delivered, and whether anyone measured the return | | |
| Claims in writing: documentation, performance transparency, continuous improvement | | |
| Who on your side can test those claims (role) | | |
| Connections: how easily it connects to the tools already in our stack | | |
| Battle-tested for reliability, security and scale, and actively maintained | | |
| Competition in this category still alive? (yes / no) | ☐ Yes ☐ No | |
| **Decision and date** | **☐ SIGN ☐ DON'T SIGN ☐ RE-CHECK ON _____ Date _____ Signed _____** | |

# AI vendor check card

## Example (fictional): claim-status reply assistant at a regional insurer

| QUESTION | ANSWER | OWNER / BY WHEN |
|---|---|---|
| Vendor, and what it would do for us | Vendor X, a Series A company: drafts claim-status email replies from our claims notes; two other finalists on the short list | n/a |
| Who owns the check (role) | The CIO's office (enterprise applications lead) | n/a |
| Reviews read by the owner? (yes / no) | ☒ Yes: 14 reviews across two sites, notes in the check file | n/a |
| Batch of your own real work run through it, outputs compared? (yes / no) | ☒ Yes: 250 claim emails run through all three finalists; the two strongest compared li | n/a |
| Trial on your work agreed, beyond the vendor's demo? (yes / no) | ☒ Yes: a 4-week trial on the live claims queue | n/a |
| Pass mark for the trial, written before it starts | 8 of 10 drafts usable with light edits, scored weekly by the service-team lead; written before week 1 | n/a |
| Exit trigger for the trial, written before it starts | **Blank: not ready** | Service-team lead, by 6 Nov |
| How much feeding it took, and what that did to the verdict | About 15 minutes per batch to clean and load the claims notes; the trial log says that alone halved the time saved | n/a |
| Vendor's stage (seed / Series A / Series B), and the reference calls it sets | Series A, so 8–10 calls an hour each; 4 done → **Fails the bar** | Service-team lead, remaining calls by 22 Nov |
| Reference questions written once, before the first call? (yes / no) | ☒ Yes: nine questions, the same on every call | n/a |
| What references said: value delivered, and whether anyone measured the return | 3 of 4 saw faster replies; none had measured the return | n/a |
| Claims in writing: documentation, performance transparency, continuous improvement | All three received in writing, dated this quarter | n/a |
| Who on your side can test those claims (role) | Two service-team analysts, named in the check file | n/a |
| Connections: how easily it connects to the tools already in our stack | Reads the claims system through a standard connector, writes drafts into the shared inbox; one custom hook quoted at 3 days of IT work | n/a |
| Battle-tested for reliability, security and scale, and actively maintained | Security review passed; live at 2 of the 4 references called; release notes every 6 weeks | n/a |
| Competition in this category still alive? (yes / no) | ☒ Yes: two other finalists priced; procurement holding the category open | n/a |
| **Decision and date** | **☐ SIGN ☐ DON'T SIGN ☒ RE-CHECK ON 30 Nov · Date 3 Nov · "No exit trigger, and 4 of the 8–10 reference calls done."** | CIO's office |