



# AI Vendor Checklist

How to pick the **right** AI vendor  
for your marketing team

# The AI Vendor Checklist

Use this checklist to ensure the AI tools you select align with your marketing objectives, integrate seamlessly, and deliver clear ROI.

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## ✓ Strategic Fit

- Clearly define the exact business or marketing problem this tool will address.
- Verify your existing tools can't solve this problem already.
- Establish measurable goals for the AI solution upfront.
- Confirm the AI tool's features match your specific use case exactly.
- Identify potential overlaps or redundancies with current systems.
- Plan a clear implementation roadmap with milestones.

## ✓ Reliability & Trust

- Check detailed vendor case studies relevant to your industry or use case.
- Ask for and contact vendor references directly.
- Verify the tool's uptime guarantee (99.9%+ uptime recommended).
- Assess vendor transparency regarding past service outages.
- Review third-party reviews from trusted platforms (G2, Capterra).
- Confirm vendor responsiveness and openness during initial interactions.

## ✓ Legal & Compliance

- Confirm full GDPR, CCPA, or other applicable regulatory compliance.
- Obtain a signed Data Processing Agreement (DPA), if applicable.
- Understand the vendor's data storage and encryption practices.
- Verify clear policies regarding data usage (ensure your data isn't shared or resold).
- Check if your data is used to train or improve the vendor's AI models.
- Ensure vendor practices transparency and explains automated decisions clearly.

## ✓ Integration Capabilities

- Verify compatibility with your CRM, analytics, and marketing automation tools.
- Test pre-built integrations via a trial or sandbox environment.
- Confirm availability of robust APIs if custom integration is needed.
- Clarify typical timelines for setup and integration process.
- Assess the vendor's technical support for integration and onboarding.
- Check if single sign-on (SSO) capability is available for easy access.

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## ✓ Ethical AI Practices

- Request vendor's policies for detecting and addressing AI biases.
- Verify clear explainability for the AI-generated results or recommendations.
- Ensure that the AI tool allows human oversight of critical decisions.
- Confirm vendor's adherence to responsible AI frameworks or guidelines.
- Investigate how the vendor handles sensitive or potentially harmful outputs.
- Ask if vendor regularly audits their AI for fairness and bias.

## ✓ Scalability & Flexibility

- Clarify how the tool scales with increased data volumes and user numbers.
- Confirm availability of advanced features as your needs grow.
- Evaluate the ease of customizing or adjusting tool features.
- Check vendor's flexibility and speed in developing requested features.
- Investigate if significant performance changes occur under heavy use.
- Confirm scalability won't significantly increase costs disproportionately.

## ✓ Support & Training

- Confirm available support channels (email, chat, phone, dedicated rep).
- Verify vendor's guaranteed support response times (preferably under 24 hours).
- Check quality and completeness of onboarding documentation and user guides.
- Ask about ongoing training resources (webinars, video tutorials, certifications).
- Ensure a user community or forum is available for peer support.
- Request a dedicated customer success contact for your account.

## ✓ Budget & ROI

- Request full transparency on pricing models (subscriptions, per-use costs, hidden fees).
- Identify potential additional or unexpected costs (extra users, integrations, storage).
- Calculate the total cost of ownership over the full contract period (1-2 years minimum).
- Request ROI case studies or benchmarks from comparable companies.
- Confirm vendor offers a trial period or pilot program to assess effectiveness.
- Evaluate potential financial impact and set clear ROI expectations before signing.

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## ✓ Vendor Stability & Roadmap

- Assess vendor's market position and overall financial stability.
- Understand vendor's product development roadmap for the next 1-2 years.
- Verify vendor's investment in R&D and continuous AI improvements.
- Check frequency and quality of past updates or new feature rollouts.
- Ensure that the vendor has a precise disaster recovery or continuity plan.
- Evaluate vendor's funding, ownership, or likelihood of acquisition (for stability).

## ✓ UX & Ease-of-use

- Test user interface for ease of use with non-technical marketing team members.
- Verify how quickly your team can realistically adopt the tool.
- Confirm availability of intuitive dashboards or visual reports.
- Evaluate ease of accessing and interpreting AI insights or recommendations.
- Ensure that users are required to have minimal training or technical background.
- Confirm mobile or remote accessibility, if relevant to your team.