



The AI Vendor Evaluation Checklist

What to verify before you sign — because the demo is the best the product will ever look

Company stability

- ☐ Financially stable, with clients in your field they'll let you call
- ☐ References from organizations your size and setting — not just their flagship logo
- ☐ A product roadmap that survives the sales call: ask what they're building next and why
- ☐ Clear answers about what happens to your data if they're acquired or shut down

Healthcare-specific capability

- ☐ Clinical validation appropriate to the use case — peer-reviewed evidence beats testimonials
- ☐ Built for your care setting, not adapted from another industry's product
- ☐ Handles your documentation and workflow reality, including low-connectivity environments if your teams work in the field
- ☐ FDA clearance status clarified, if the use case requires it

Privacy, security & compliance

- ☐ Current HIPAA Security Rule compliance, in writing — and ask how they track regulatory updates
- ☐ Business Associate Agreement reviewed by your counsel, not just signed
- ☐ Clarity on whether and how your data trains their models — get the answer in the contract
- ☐ Breach notification terms and incident history disclosed
- ☐ SOC 2 or equivalent third-party security audit, current

Integration & IT reality

- ☐ Real integration with your EHR and existing systems — demand a demo in an environment like yours, not their sandbox
- ☐ Honest answer on implementation timeline from a reference client, not the sales deck
- ☐ Single sign-on and role-based access controls
- ☐ Defined data export path — you can leave with your data, in a usable format

Implementation & support

- ☐ Named implementation team, not a ticket queue
- ☐ Training included — for all shifts and skill levels, not one webinar
- ☐ Support hours that match healthcare hours (your night shift exists; does theirs?)
- ☐ Defined success metrics and a check-in cadence for the first 90 days

Downtime, upgrades & model changes

- ☐ Uptime commitment and maintenance windows, in the contract

- ☐ Advance notice before the underlying AI model is upgraded or retired — vendors decommission models and publish new ones, and outputs change when they do
- ☐ A re-validation plan after every major model change: who retests, what gets checked, who signs off
- ☐ Deprecation terms for features your workflows depend on

The real cost

- ☐ Total cost of ownership: licenses + implementation + integration + training + internal staff time
- ☐ Price protection at renewal — year-one pricing means nothing without it
- ☐ What triggers additional fees: users, volume, features, storage
- ☐ Exit costs if it doesn't work out

Red flags — walk away or dig deeper

- Reluctance to provide references you choose from a client list
- "AI-powered" claims they can't explain in plain language
- Guarantees of specific ROI numbers before understanding your operation
- Pressure to sign before your clinical, IT, and legal reviews finish
- Vague answers about data ownership and model training

Five questions that separate real vendors from decks

- "Walk me through your last implementation that went badly. What happened?"
- "Which of your clients is most like us, and can I speak with them directly?"
- "What does my data train, and where does that answer live in the contract?"
- "What will this cost in year three?"
- "What should we have in place before implementation starts — honestly?"

Want this as a session for your team or conference? This guide pairs with "AI Without the Anxiety: Making Technology Work FOR Your Team" — a plain-spoken session for leaders who don't need a tech background, just a clearer head and a starting point. heatherlambert.speaker@gmail.com · 615.434.5180