

PLATFORM EVALUATION

AI Vendor and Platform Evaluation Checklist

A worksheet for evaluating AI platforms through architecture fit, governance, privacy, workflow integration, and operational needs.

WHAT THIS TEMPLATE HELPS YOU DECIDE

Avoid choosing platforms only by feature demos. Compare vendors by data handling, integration model, tool support, observability, cost, and governance fit.

BEST FOR

- Teams evaluating AI platforms or vendors
- Operators comparing build vs buy options
- Leaders who need architecture-fit criteria

OUTPUTS

- Vendor comparison criteria
- Architecture-fit score
- Procurement risk notes

STEP 1

Frame the operating need

Start with the workflow, decision, owner, and business pressure. The template is useful only when it is grounded in a real operating moment.

Operating frame

Vendor or platform

Name the provider, product, or architecture option.

Workflow served

Tie evaluation to a real workflow, not a generic capability.

Decision owner

Name who decides whether this platform fits the operating architecture.

Readiness check

- Data handling and retention terms are understood
- Integration model fits existing systems
- Tool execution and permissions can be governed
- Observability and logs support review
- Cost model matches expected usage
- Exit or fallback path is realistic

STEP 2

Map the architecture questions

Use this page to separate the parts of the system that need design before anyone jumps to tools, prompts, or implementation details.

Design map

Data posture	How does the platform handle privacy, retention, training, and residency concerns? _____
Workflow fit	Does the platform support the actual operating process? _____
Integration fit	Can it read, write, and authenticate with required systems safely? _____
Governance fit	Can approvals, permissions, logs, and escalations be enforced? _____
Economics	Does pricing fit workflow frequency, value, and risk? _____

The best platform is the one that fits the operating architecture, not the one with the most impressive demo.

STEP 3

Turn the answers into a brief

A strong brief makes the next decision easier: proceed, defer, redesign, govern, or assess more deeply before implementation.

Decision brief

Fit rating	Strong fit, partial fit, risky fit, or not recommended? _____
Key risk	Which gap could become operational debt? _____
Mitigation	What control, contract, or architecture choice reduces that risk? _____
Decision	Buy, pilot, defer, build, or reject? _____

Evaluate AI vendors through operating fit.

IntelliSync helps teams compare platforms by workflow fit, data posture, governance, observability, and long-term architecture.

[Open Architecture Assessment](#)