



AI Vendor and Platform Evaluation Checklist

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

STRUCTURE - CLARITY - BETTER DECISIONS

Practical architecture for accountable AI-enabled work.

What this template is for

Avoid choosing platforms only by feature demos. Compare vendors by data handling, integration model, tool support, observability, cost, and governance fit. Use this guide to make the operating choice explicit, test it with evidence, and record who owns the next decision.

BEST USED WHEN

Teams turning architecture work into a reusable operating artifact.

WHO SHOULD BE IN THE ROOM

Include the workflow owner, a person who performs the work, a reviewer with authority to approve or stop it, and the relevant data or tool owner.

CANADIAN CONTEXT

Confirm applicable federal, provincial, territorial, sector, professional, contractual, accessibility, and bilingual-service requirements. Use this workbook as operational preparation, not legal advice.

A five-step working rhythm

01

Data posture

How does the platform handle privacy, retention, training, and residency concerns?

02

Workflow fit

Does the platform support the actual operating process?

03

Integration fit

Can it read, write, and authenticate with required systems safely?

04

Governance fit

Can approvals, permissions, logs, and escalations be enforced?

05

Economics

Does pricing fit workflow frequency, value, and risk?

Build the working record

Complete one record for one workflow. Write enough to support a decision, not a generic technology wish list.

PROMPT	YOUR WORKING NOTES
01 Vendor or platform	
02 Workflow served	
03 Decision owner	
04 Data posture	
05 Workflow fit	
06 Integration fit	
07 Decision, owner, evidence, and review date	

Evaluate client-data handling

STARTING FRICTION

A vendor promises secure collaboration but gives vague answers on data retention and export.

WORKFLOW MAP

REQUIREMENTS

VENDOR EVIDENCE

HANDS-ON TEST

RISK REVIEW

DECISION

EXIT PLAN

AI-SUPPORTED ROLE

Compare documented platform capabilities against a fixed rubric and cite vendor evidence. Flag uncertainty around data posture.

HUMAN AUTHORITY

Procurement and business owners validate claims, contract terms, risks, and exit options. Resolve the data posture question for this case.

PILOT MEASURE

Track unanswered questions, tested claims, total cost, portability, and control gaps. Record data posture exceptions separately.

DISCUSSION PROMPT

What evidence would the reviewer need to trust, correct, reject, or escalate this output?

Compare POS integrations

STARTING FRICTION

Several platforms show impressive demos, but only some support the store's actual data and approval path.

WORKFLOW MAP

REQUIREMENTS

VENDOR EVIDENCE

HANDS-ON TEST

RISK REVIEW

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AI-SUPPORTED ROLE

Compare documented platform capabilities against a fixed rubric and cite vendor evidence. Flag uncertainty around workflow fit.

HUMAN AUTHORITY

Procurement and business owners validate claims, contract terms, risks, and exit options. Resolve the workflow fit question for this case.

PILOT MEASURE

Track unanswered questions, tested claims, total cost, portability, and control gaps. Record workflow fit exceptions separately.

DISCUSSION PROMPT

What evidence would the reviewer need to trust, correct, reject, or escalate this output?

Evaluate auditability

STARTING FRICTION

A platform can draft summaries but cannot clearly show source lineage or reviewer changes.

WORKFLOW MAP



AI-SUPPORTED ROLE

Compare documented platform capabilities against a fixed rubric and cite vendor evidence. Flag uncertainty around integration fit.

HUMAN AUTHORITY

Procurement and business owners validate claims, contract terms, risks, and exit options. Resolve the integration fit question for this case.

PILOT MEASURE

Track unanswered questions, tested claims, total cost, portability, and control gaps. Record integration fit exceptions separately.

DISCUSSION PROMPT

What evidence would the reviewer need to trust, correct, reject, or escalate this output?

Before the pilot grows

Use these prompts to test whether the proposed workflow can operate responsibly in its Canadian business context.

01

Data posture

Data handling and retention terms are understood. Name the owner and the operating decision before selecting a tool.

02

Workflow fit

Integration model fits existing systems. Record the approved sources, permissions, and missing information.

03

Integration fit

Tool execution and permissions can be governed. Test this boundary with representative and adverse cases.

04

Governance fit

Observability and logs support review. Preserve review, escalation, and correction evidence.

05

Economics

Cost model matches expected usage. Set a measurable stop condition and the next review date.

06

Readiness to proceed

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

CANADIAN REFERENCE POINTS

Office of the Privacy Commissioner of Canada - Privacy and artificial intelligence
priv.gc.ca/en/privacy-topics/technology/artificial-intelligence/

Government of Canada - Artificial Intelligence guidance, principles, and policy
canada.ca/en/services/science/innovation/artificial-intelligence.html

General operational guidance only. Confirm applicable legal, privacy, cybersecurity, professional, contractual, and regulatory requirements with qualified advisors.