

QUESTIONNAIRE • PROCUREMENT

The ten vendor questions

Every AI vendor's demo is good; that is what demos are for. What separates a vendor you can trust with member or client data from one you cannot is how they answer ten plain questions in writing. Send them before the second call. Score each answer red, yellow or green.

#	QUESTION	WHAT A GOOD ANSWER LOOKS LIKE	SCORE
1	Is our data used to train or improve your models, or anyone else's?	"No," in the contract, not the FAQ.	☐ ☐ ☐
2	Where is our data stored and processed, and who are your subprocessors?	A named list with locations, not a link.	☐ ☐ ☐
3	How long do you retain prompts, uploads and outputs, and can we set that to zero?	A number of days, and "yes."	☐ ☐ ☐
4	What do you log, and can we export the log?	A sample log, and an export format.	☐ ☐ ☐
5	When your product informs a decision about a person, what explanation will you give that person?	The actual text a person would read; from Jan 1, 2027 this is a legal question in Colorado and California.	☐ ☐ ☐
6	When was your last bias test, who ran it, and can we see the summary?	A date, a name, and a document.	☐ ☐ ☐
7	What is the human-review path inside the product, and how is it recorded?	A screen, a role, and a record.	☐ ☐ ☐
8	What happens to our data, our prompts and our configuration if we leave?	Export in a usable format; deletion in writing, with a date.	☐ ☐ ☐
9	How will you notify us of a security incident, and within what time?	A channel and a number of hours.	☐ ☐ ☐
10	What in your pricing changes with usage, and what did it cost your customers last year?	The variable part named, and a real range.	☐ ☐ ☐

Three more for unions and funds

- 11 Does the product touch protected health information, and will you sign a business associate agreement? 

- 12 Can the tool be deployed inside our environment, and can our own material become an assistant without leaving? 

- 13 What notice and human-review language will you support for anything touching bargaining-unit members? 

How to read the answers

Short, specific, contractual answers are a good sign. Long answers that restate the marketing are not. A vendor who says “we take security seriously” instead of naming a retention period has told you the retention period is not zero. A vendor who cannot name subprocessors has not looked. A vendor who will not put the training answer in the contract should not hold your data.

General information, not legal advice. Have your counsel read the contract before you sign it.

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