

## 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.

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**Workflow served**

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

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**Decision owner**

Name who decides whether this platform fits the operating architecture.

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## 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?<br><hr/> |
| Workflow fit    | Does the platform support the actual operating process?<br><hr/>                            |
| Integration fit | Can it read, write, and authenticate with required systems safely?<br><hr/>                 |
| Governance fit  | Can approvals, permissions, logs, and escalations be enforced?<br><hr/>                     |
| Economics       | Does pricing fit workflow frequency, value, and risk?<br><hr/>                              |

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?<br><hr/>           |
| Key risk   | Which gap could become operational debt?<br><hr/>                          |
| Mitigation | What control, contract, or architecture choice reduces that risk?<br><hr/> |
| Decision   | Buy, pilot, defer, build, or reject?<br><hr/>                              |

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