AI VENDOR EVALUATION

BIG **i**
AGENTS COUNCIL
FOR TECHNOLOGY.

COMPLETE CHECKLIST—QUICK REFERENCE FOR MUST-HAVES IN AI SOLUTIONS FOR INDEPENDENT AGENCIES

Use this list during demos, procurement calls, or as a vendor vetting worksheet.

Fit & Functionality

☐ Customizable to your agency workflows

☐ Any integration with other tools? (AMS, CRM, etc)

☐ Real-time + batch automation available

☐ Workflow audit trails & logs

☐ Demonstrates it can solve for a specific problem at your agency

Security, Privacy & Compliance

☐ SOC 2 Type II or ISO 27001 certification

☐ Data encrypted in transit & at rest

☐ Agency retains full data ownership

☐ Control over data retention & deletion

☐ No third-party data sharing without consent

☐ Transparent subcontractor relationships

AI Use & Oversight

- ☐ Clear explanation of AI type used
- ☐ Human oversight of AI output
- ☐ Bias & inaccuracy prevention safeguards
- ☐ Adjustable rules & override options
- ☐ Transparent data usage & training policy (both vendor & AI model being used)

Pricing, Contracts & Legal

- ☐ Transparent, itemized cost breakdown
- ☐ Scalable pricing model
- ☐ No hidden integration or support fees
- ☐ SLAs for uptime, errors, & support
- ☐ Trial period available
- ☐ Exit clauses & data portability guaranteed
- ☐ Cyber liability & indemnification included
- ☐ Termination clause within 3-6 months if performance is unsatisfactory

Implementation & Support

- ☐ Clear implementation timeline provided
- ☐ Real examples of agency onboarding success
- ☐ Role-based onboarding & training
- ☐ Dedicated account manager post-launch

Peer Validation

- ☐ Other agencies in your network use the tool
- ☐ IA-focused case studies or success stories shared
- ☐ Vendor is experienced in the IA channel

Red Flags

- ☐ Vague about data ownership or privacy
- ☐ Avoids answering liability or mistake-related questions
- ☐ No references or case studies
- ☐ Restricts access to your agency's data

This list is provided for informational purposes only and does not constitute legal advice. Please conduct your own due diligence when evaluating vendors or entering into any agreements.

ABOUT THE BIG "I" AGENTS COUNCIL FOR TECHNOLOGY

We are passionate about helping independent agents embrace technology to execute their unique business strategies.

ACT brings together agents, carriers, tech providers, and industry groups through events, webinars, and workgroups to share insights and deliver resources to Big "I" members.