AI Chatbot Vendor Evaluation Checklist

15 questions to ask before you sign

PRICING & CONTRACTS

- [ ] 1. Is the monthly price fixed, or does it include usage fees on top?
- [ ] 2. Are there per-resolution or per-message charges beyond the base plan?
- [ ] 3. What happens when I exceed my plan limits? Hard cap or automatic overage billing?
- [ ] 4. Is there a minimum contract length, or can I cancel month-to-month?
- [ ] 5. Are onboarding, setup, or migration fees charged separately?

AI CAPABILITY

- [ ] 6. Can the AI learn from my product catalog, FAQs, and order history?
- [ ] 7. How does it handle questions it cannot answer? Does it escalate or guess?
- [ ] 8. What AI model powers it? Does the pricing tier affect this?
- [ ] 9. Can I review and correct AI responses before they go live?

INTEGRATIONS

- [ ] 10. Does it connect natively with Shopify, my CRM, and helpdesk? Or does that cost extra?
- [ ] 11. What is the implementation timeline for integrations?
- [ ] 12. Are there API call limits that could affect performance during peak traffic?

SUPPORT & ONBOARDING

- [ ] 13. Is there a dedicated onboarding process, or am I self-serve from day one?
- [ ] 14. What support tier do I get on my plan?
- [ ] 15. What are the SLA response times if something breaks during a sale period?

Scoring Guide

12-15 Yes answers	Strong fit. Proceed with a trial.
8-11 Yes answers	Ask for clarification on gaps before committing.
Below 8	High risk of hidden costs or gaps. Keep evaluating.

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