

AI Support Vendor Billing Checklist

Purpose: Use this checklist to compare AI support vendors consistently, identify hidden costs, and document responses before signing a contract.

Company Information

Item	Vendor A	Vendor B	Vendor C
Vendor Name			
Contact Name			
Product Evaluated			
Date Reviewed			
Reviewer			

Preparation Checklist

Before evaluating vendors:

- ☐ Document current ticket volume
- ☐ Document current conversation volume
- ☐ Document support channels (chat, email, voice, social)
- ☐ Estimate future growth projections
- ☐ Separate recurring vs. one-time costs
- ☐ Identify required integrations
- ☐ Define budget limits
- ☐ List compliance/security requirements

Pricing Foundation

1. What pricing model does your platform use?

Question	Vendor A	Vendor B	Vendor C
Per agent pricing			
Per conversation pricing			
Per resolution pricing			
Usage/credit-based pricing			
Other pricing model			

Notes:

2. Are AI features included or billed separately?

Question	Vendor A	Vendor B	Vendor C
AI included in base plan			
AI billed separately			
Extra AI usage charges			
Feature limitations			
AI included in base plan			

Notes:

3. How is AI usage or “resolution” measured?

Question	Vendor A	Vendor B	Vendor C
Resolution definition provided			
Reopened tickets counted again			
Escalations billed			
Abandoned sessions billed			
Definition provided in writing			

Notes:

Usage Limits and Implementation

4. Are there limits on AI interactions?

Item	Vendor A	Vendor B	Vendor C
Monthly AI limit			

Overage fees			
Usage throttling			
Additional capacity available			
Monthly AI limit			

5. Are implementation and onboarding fees included?

Item	Vendor A	Vendor B	Vendor C
Onboarding included			
Training included			
Migration included			
Setup/configuration fee			
Onboarding included			

6. How are integrations priced?

Item	Vendor A	Vendor B	Vendor C
CRM integrations			
Knowledge base integrations			
API access costs			
Channel-based pricing differences			
CRM integrations			

7. Are automation workflows included?

Item	Vendor A	Vendor B	Vendor C
Workflow automation included			
Triggers included			
Approvals included			
AI actions included			
Workflow automation included			

Scale and Ongoing Costs

8. What happens when support volume grows?

Item	Vendor A	Vendor B	Vendor C
Current volume pricing			
Double volume pricing			
5x volume pricing			

Volume discounts available			
Current volume pricing			

9. Does knowledge base usage affect pricing?

Item	Vendor A	Vendor B	Vendor C
Storage costs			
Content indexing fees			
Upload limits			
AI retrieval charges			
Storage costs			

10. Is support included?

Support Type	Vendor A	Vendor B	Vendor C
Email support			
Live chat support			
Phone support			
Priority support			
Dedicated account manager			

Contracts and Transparency

11. Are there long-term commitments?

Item	Vendor A	Vendor B	Vendor C
Annual contract required			
Monthly option available			
Early termination fees			
Price protection offered			
Credit rollover allowed			

12. How are additional users billed?

Item	Vendor A	Vendor B	Vendor C
Agent pricing			
Supervisor pricing			
Admin pricing			
Read-only user pricing			
Agent pricing			

13. Can you provide a complete cost breakdown?

Cost Element	Vendor A	Vendor B	Vendor C
Subscription fees			
AI usage charges			
Automation costs			
Integration fees			
Support fees			

Accountability

- ☐ Vendor explains liability for AI-generated billing errors
- ☐ Refund/credit policy documented
- ☐ Escalation process documented

14. How much will the platform cost at our scale?

Item	Vendor A	Vendor B	Vendor C
Estimated monthly cost			
Estimated annual cost			
Pilot program available			
Month-to-month option available			
Estimated monthly cost			

Notes:

Billing Red Flags Scorecard

Mark any warning signs identified.

Red Flag	Vendor A	Vendor B	Vendor C
Unclear usage definitions	☐	☐	☐
Hidden overage fees	☐	☐	☐
Custom pricing without transparency	☐	☐	☐
Undisclosed implementation costs	☐	☐	☐

Complex billing model	☐	☐	☐
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Final Evaluation Score

Criteria	Weight	Vendor A	Vendor B	Vendor C
Pricing Transparency	25%			
Scalability	20%			
Contract Flexibility	15%			
AI Billing Clarity	20%			
Support and Services	10%			

Total Score

Vendor A: _____ /100

Vendor B: _____ /100

Vendor C: _____ /100

Recommended Vendor

Decision Notes

