

AI Support Vendor Questions About 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

Understand how the vendor charges for AI support and how billing definitions can affect long-term costs.

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			

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			

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

Question	Vendor A	Vendor B	Vendor C
Resolution definition provided			
Reopened tickets counted again			
Escalations billed			

Usage Limits and Implementation

Implementation, usage caps, and integration fees can significantly influence the platform's total cost.

4. Are there limits on AI interactions?

Question	Vendor A	Vendor B	Vendor C
Monthly AI limit			
Overage fees			
Usage throttling			
Additional capacity available			

5. Are implementation and onboarding fees included?

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

6. How are integrations priced?

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

7. Are automation workflows included?

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

Scale and Ongoing Costs

These questions help evaluate how pricing changes as support volume, automation usage, and self-service adoption increase.

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			

9. Does knowledge base usage affect pricing?

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

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

Clear contract terms and billing transparency help prevent unexpected costs and reduce financial risk.

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			

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			
Add-ons			

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			

Billing Red Flags Scorecard

Mark any warning signs identified during vendor discussions. Multiple red flags may indicate higher billing risk or lower pricing transparency.

Red Flag	Vendor A	Vendor B	Vendor C
Unclear usage definitions	☐	☐	☐
Hidden overage fees	☐	☐	☐
Custom pricing without transparency	☐	☐	☐
Undisclosed implementation costs	☐	☐	☐
Complex billing model	☐	☐	☐
Separate AI feature charges	☐	☐	☐

Final Evaluation Score

Score each vendor against the criteria below and calculate a total score out of 100.

Criteria	Weight	Vendor A	Vendor B	Vendor C
Pricing transparency	25%			
Scalability	20%			
Contract flexibility	15%			
AI billing clarity	20%			
Support and services	10%			
Integration costs	10%			

Total Score

- Vendor A: _____ /100
- Vendor B: _____ /100
- Vendor C: _____ /100

Recommended vendor

Reason for selection (pricing, scalability, support, or other factors)

Decision notes
