BUYER'S CHECKLIST

Ten questions to ask any AI vendor

For commercial real estate brokers choosing an AI assistant. Ask each question in writing, score the answer, and add it up on the last page.

Vendor: _____

Date: _____ Scored by: _____

How to score each answer

0 = No clear answer, or a red flag. The vendor dodged the question, answered in marketing words only, or gave the red flag answer.

1 = Partly answered. An answer, but nothing you can check: no page, document, test or named record behind it.

2 = Clear and checkable. A specific answer you can verify yourself from a published page, a document or a demonstration.

Questions marked RESOLVE IN WRITING (1, 2, 6, 9) matter whatever the total: if the vendor scores 0 on one, get a written answer before you sign.

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1. Data sources and licences [RESOLVE IN WRITING]

ASK List every source of the data your AI uses to find owners, properties and contacts. Say which are public records, which are licensed or bought, and what each licence lets me do with the data.

GOOD A named list of sources, each marked public record, licensed or supplied by you, with the date it was last refreshed and a plain statement of how it may be used. They also tell you which data they will not use.

RED FLAG A "proprietary database" with no sources, scraped social profiles presented as records, or an answer that treats licence terms as someone else's concern.

Score

☐ 0 ☐ 1 ☐ 2

Notes and evidence:

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2. Human approval before anything is sent [RESOLVE IN WRITING]

ASK Can your AI send an email, letter or text to a client, prospect or owner without a person approving that exact message first? If a setting allows it, who can change the setting, and where is the change recorded?

GOOD Outbound messages start as drafts and wait for a named person to approve them. Any exception is off by default, is a deliberate choice by the account owner, can be switched back, and leaves a record.

RED FLAG "Fully autonomous outreach" offered as a feature, no way to read a message before it goes, or an approval step that anyone can bypass.

Score

☐ 0 ☐ 1 ☐ 2

Notes and evidence:

3. Coverage in your counties

ASK Which counties and states do you cover today, how complete is the data in each, and what happens when I work in a county you do not cover yet?

GOOD A county by county list showing what is loaded, what is missing and when it was refreshed, an honest "not yet" for the rest, and a way to ask for a county that is not covered.

RED FLAG "Nationwide coverage" with no county detail, blank fields shown as zero, or no way to see what is missing in your market.

Score

☐ 0 ☐ 1 ☐ 2

Notes and evidence:

4. Published pricing

ASK What does the product cost for one broker, what is included, what is metered or extra, and can I see the price without talking to sales?

GOOD A published price, the length of the commitment, what the monthly fee includes, and a stated rule for anything metered. Heavy use is discussed before it is billed.

RED FLAG "Contact sales" for every plan, per-seat pricing that hides usage charges, or a long contract before you have used the product.

Score

☐ 0 ☐ 1 ☐ 2

Notes and evidence:

5. Published accuracy

ASK What share of your results are right, how do you measure it, on how many examples, and where can I read the numbers?

GOOD Figures by market or data type, with the method, the sample size and the date, weak spots included. Where there are too few examples, they say so instead of printing a number.

RED FLAG A single headline figure with no method, "up to" claims, accuracy described only through customer quotes, or a refusal to say how it is measured.

Score

☐ 0 ☐ 1 ☐ 2

Notes and evidence:

6. Data ownership and export [RESOLVE IN WRITING]

ASK Who owns the contacts, deals and notes I put in? Can you or anyone else train a model on them? Can I download all of it, in which format, whenever I want?

GOOD A clear statement that the data is yours, a written position on model training, and a self-service export in standard formats that covers every record type, with a manifest so you can check nothing is missing.

RED FLAG Export only on request or for a fee, no statement about model training, or terms that give the vendor broad rights to your content.

Score

☐ 0 ☐ 1 ☐ 2

Notes and evidence:

7. Security and customer isolation

ASK How is my data kept apart from your other customers' data, what independent evidence do you have (a report, an audit or tests I can read about), and what is not covered yet?

GOOD A plain description of where isolation is enforced, the evidence behind it with dates, and an honest list of what is missing, such as an audit the vendor does not have yet.

RED FLAG Security badges with no report behind them, "military-grade encryption" and nothing else, or a list of certifications the vendor cannot show you.

Score

☐ 0 ☐ 1 ☐ 2

Notes and evidence:

8. Who is accountable when the AI is wrong

ASK When your AI gets a fact wrong, writes something it should not, or a message it drafted causes a complaint, who is responsible, what does your contract say, and what record shows what happened?

GOOD A plain statement that the broker remains responsible for what goes out, a contract that says what the vendor does and does not warrant, and an activity record showing what the assistant did and who approved it.

RED FLAG Marketing that promises accuracy while the contract disclaims everything, no activity record, or a refusal to put the split of responsibility in writing.

Score

☐ 0 ☐ 1 ☐ 2

Notes and evidence:

9. Email, text and call compliance [RESOLVE IN WRITING]

ASK How does your product help me meet CAN-SPAM, the TCPA and state telemarketing law such as the Florida Telephone Solicitation Act? What does the software enforce, and what is left to me?

GOOD A short list of what the software enforces (sender identification, a working unsubscribe, a permanent suppression list, consent records, calling hours), what the customer must still do, and a statement that none of it is legal advice.

RED FLAG "Fully compliant" with no detail, bulk cold texting or calling as a feature, or no way to record consent and honor an opt-out across channels.

Score

☐ 0 ☐ 1 ☐ 2

Notes and evidence:

10. What happens to your data when you leave

ASK If I cancel, how do I get my data out, how long until you delete it, and does it stay in backups, logs or with your subprocessors after that?

GOOD A self-service export before you cancel, a stated deletion process and time frame, a plain account of how long backups keep a deleted record, and a list of the companies that process your data.

RED FLAG Deletion "on request" with no time frame, no mention of backups, or terms that let the vendor keep and use your data after you leave.

Score

☐ 0 ☐ 1 ☐ 2

Notes and evidence:

Add it up

Q1 Data sources and licences: ____
Q2 Human approval before anything is sent: ____
Q3 Coverage in your counties: ____
Q4 Published pricing: ____
Q5 Published accuracy: ____
Q6 Data ownership and export: ____
Q7 Security and customer isolation: ____
Q8 Who is accountable when the AI is wrong: ____
Q9 Email, text and call compliance: ____
Q10 What happens to your data when you leave: ____

Total: _____ out of 20

What the total suggests

17 to 20 = Strong. Most answers can be checked. Confirm the few that are not in writing, then decide on fit and price.

12 to 16 = Mixed. Go back to every question you scored 0 or 1 and ask for the evidence in writing before you decide.

0 to 11 = Weak. Too much rests on trust. Ask for a written answer to each zero, or keep looking.

This checklist is not legal advice. For the compliance questions (email, texts and calls, state telemarketing law), ask your own counsel what applies to you.

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