

PRACTICAL AI FOR SOURCING TEAMS

AI Vendor Evaluation

Starter Playbook

A governed workflow for organizing proposal evidence, surfacing gaps, and preparing a human-led evaluation.

WHAT THIS IS

A practical starting system: preparation guidance, workflow, reusable prompts, review controls, and an editable comparison workbook.

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PlaybookTemplates.com

Start here

Use this playbook to accelerate the administrative work around evaluation while preserving evaluator independence, fairness, confidentiality, and accountability.

CORE PRINCIPLE

AI may help locate, organize, compare, and summarize evidence. It should not assign final scores, select a vendor, invent missing facts, or replace an authorized evaluator.

Before you begin

- Confirm that your organization permits the selected AI tool and proposed data use.
- Use only approved source material. Remove or mask confidential or personal information when required.
- Define requirements, scoring scales, and evaluator roles before introducing AI output.
- Keep original proposals and a traceable record of every source used.
- Tell evaluators what AI did and did not do.

When not to use this workflow

- Policy prohibits proposal content from entering the available AI environment.
- Source documents cannot be reliably extracted or cited.
- The task requires specialist conclusions outside the team's expertise.
- AI output could bias independent scoring before initial evaluator review.

The four-stage workflow

Stage	Purpose
1. Prepare	Create a clean source set, lock evaluation criteria, and establish data boundaries.
2. Extract	Locate explicit evidence, limitations, exceptions, and missing responses.
3. Compare	Build a neutral evidence map without generating final scores.
4. Validate	Require evaluator verification, corrections, clarifications, and documented decisions.

Stage gates

- Preparation: source list and AI-use approval documented.
- Extraction: every observation includes a source location.
- Comparison: no model-generated vendor rank or award recommendation.
- Validation: accountable humans confirm all material statements.

Prompt set 1: evidence extraction

Run prompts separately for each vendor before asking for cross-vendor comparison. This reduces anchoring and keeps the source trail easier to inspect.

PROMPT 1 - REQUIREMENT EVIDENCE MAP

Using only the supplied proposal, review each listed requirement. Return: requirement ID; exact vendor statement or concise excerpt; source page/section; stated limitation or dependency; missing information. Do not infer compliance. If support is absent, write "not established."

PROMPT 2 - EXCEPTIONS AND DEPENDENCIES

Identify every explicit exception, assumption, dependency, prerequisite, optional component, third-party reliance, or future commitment. Cite the source. Do not decide whether an item is acceptable.

PROMPT 3 - EVIDENCE QUALITY

Classify support for each material claim as: documented evidence; customer reference; assertion only; future roadmap; unclear. Include the source and do not score the claim.

REVIEWER INSTRUCTION

Open the proposal at every cited location. Correct inaccurate citations before the output enters an evaluation packet.

Prompt set 2: neutral comparison

Only compare fields defined before proposals were reviewed. Avoid asking which vendor is best.

PROMPT 4 - CROSS-VENDOR EVIDENCE TABLE

Using the verified evidence maps, create a side-by-side table by requirement. Preserve evaluator-defined order. Show evidence status, limitation, and source citation. Do not rank vendors or calculate scores.

PROMPT 5 - CLARIFICATION CANDIDATES

Identify questions that could resolve missing, conflicting, conditional, or ambiguous information. Draft each question neutrally and do not reveal another vendor's response.

PROMPT 6 - CONTRADICTION FINDER

Within each vendor's materials, identify statements that appear inconsistent. Cite both passages and explain the apparent tension without resolving it.

Avoid	Use instead
Rank the proposals.	Organize verified evidence by predefined criteria.
Tell me which vendor is compliant.	Identify passages requiring qualified review.
Fill in missing answers.	Mark missing evidence as not established.

Human review protocol

AI output becomes usable only after an accountable person verifies it.

- 1 Verify each source citation against the original proposal.
- 2 Confirm excerpts preserve qualifiers and context.
- 3 Check tables, footnotes, appendices, hyperlinks, and exception schedules.
- 4 Remove unsupported inference, sentiment, ranking, or scoring.
- 5 Separate vendor statements from evaluator observations.
- 6 Record corrections in the AI Use Log.
- 7 Escalate specialist interpretations.
- 8 Release only the validated version.

BIAS CONTROL

Consider withholding cross-vendor AI summaries until evaluators complete an initial independent review. Follow the evaluation plan and policy.

Minimum documentation

- Tool and model used
- Date of analysis
- Files and versions supplied
- Prompts used
- Reviewer and review date
- Material corrections or rejected output

Data safety checklist

Complete this check before placing proposal content into an AI system.

Check	Question
Tool approval	Is the model approved for this use?
Data classification	What confidentiality or personal-data restrictions apply?
Training / retention	Will the provider retain inputs or train on them?
Access	Who can view prompts, files, output, and logs?
Location	Are geographic processing requirements applicable?
Redaction	Can sensitive fields be removed safely?
Contract terms	Do terms restrict this processing?
Recordkeeping	Must prompts and outputs be retained?

STOP
CONDITION

If the answer to tool approval or data permission is unclear, do not upload the material.
Resolve the question first.

Example: proposal to review question

This fictional example demonstrates the discipline of preserving evidence and uncertainty.

REQUIREMENT

The solution must support single sign-on using the organization's identity provider.

Vendor statement

"SSO is available through our Enterprise tier and supports SAML 2.0. Configuration requires Professional Services."

Acceptable AI extraction

- Evidence status: explicit statement provided.
- Conditions: Enterprise tier; Professional Services required.
- Source: proposal section 4.2 (fictional example).
- Open question: Does proposed pricing include the required tier and services?

Unacceptable conclusion

DO NOT USE

"Vendor fully meets the SSO requirement and should receive maximum points."

Neutral clarification question

DRAFT QUESTION

Please confirm whether the proposed subscription and implementation pricing includes the Enterprise tier and all Professional Services required to configure SAML 2.0 SSO. Identify additional fees, dependencies, and estimated implementation time.

Workbook quick start

The companion Excel workbook keeps editable inputs, formulas, evidence, clarifications, and AI-use records in one traceable file.

Worksheet	Purpose
Instructions	Workflow and scoring rules.
Requirements	Predefined criteria and weights.
Scorecard	Human scores and formula-driven totals.
Clarifications	Neutral questions, responses, and status.
AI Use Log	Tools, prompts, sources, reviewers, and corrections.

Suggested sequence

- 1 Finalize requirements and weights.
- 2 Distribute independent evaluator instructions.
- 3 Use AI only for approved evidence preparation.
- 4 Validate evidence and clarification candidates.
- 5 Enter human scores and rationale.
- 6 Resolve clarifications and document changes.
- 7 Retain the final evaluation record.

Prompt customization canvas

Adapt prompts without losing the controls that make the workflow defensible.

Field	Design question
Task	What narrow job should AI perform?
Approved sources	Which files or fields may it use?
Required output	What exact fields and format are needed?
Prohibited behavior	What must it not infer, rank, decide, or invent?
Citation standard	How must statements point to evidence?
Uncertainty rule	How should gaps or conflicts appear?
Human gate	Who validates the output before use?

Final review checklist

- AI use was approved for the selected tool and data.
- Requirements and scoring rules were set independently.
- Every material statement is traceable to a source.
- No AI-generated score, rank, recommendation, or award decision remains.
- Clarification questions are neutral.
- Specialist matters received qualified review.
- The AI-use record captures prompts, files, reviewers, and corrections.
- Authorized people made and documented the final decision.

REMEMBER

A fast process is not a defensible process unless evidence, judgment, and accountability remain visible.

This original, generic educational resource is not procurement, legal, compliance, privacy, security, technical, or financial advice. Adapt it to your policies and obtain qualified review where appropriate.