

The perfect partner

Choosing an employee benefits AI vendor



Drowning in noise from AI vendors? According to [2024 research from HealthEquity](#), nearly 70% of employee benefits leaders hear sales pitches for AI-driven products at least once a month.

AI has the potential to support many exciting benefits goals, but your team needs the right platform to build the solutions. Once you've settled on the [first problem you'll solve with AI](#), it's time to find a vendor partner.

Before you start shopping around be sure to define your business requirements. These are the “must haves” that will allow your AI project to deliver the business outcomes you want to reach.

After your requirements are clear, you can use this checklist to compare several vendors across important categories, from security all the way to implementation. Once you're done, see how they stack up in the areas that matter most to you and your organization.

	Importance to our team (1-5)	Vendor 1	Vendor 2	Vendor 3
Expertise				
Benefits industry expertise <ul style="list-style-type: none"> • Experience engineering benefits solutions • Demonstrated long-term industry clients or case studies 				
Technical expertise <ul style="list-style-type: none"> • Learning frameworks used • Large language model (LLM) technologies used 				
Risk management				
Security <ul style="list-style-type: none"> • Information security certifications (SOC 2, ISO 27001, HITRUST, etc.) • Encryption methods used • Access control • Incident response plans 				

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Data quality <ul style="list-style-type: none"> Data collection practices Data quality checks Approach to handling biased or underrepresented data sets 				
Data privacy <ul style="list-style-type: none"> Commitment to data protection regulations (GDP, CCPA, etc.) Data storage practices 				
Sales process				
Cultural fit <ul style="list-style-type: none"> Communication style and frequency Responsiveness to questions and concerns 				
Closing details <ul style="list-style-type: none"> Contract negotiation Availability to pilot one project before final contract/sale 				
Implementation				
System integration <ul style="list-style-type: none"> Interfacing capabilities with existing benefits and HR solutions Support available for bespoke requirements 				
Onboarding <ul style="list-style-type: none"> Training for other benefits team members or employees Ongoing project-specific support 				
Success metrics <ul style="list-style-type: none"> Support in defining success Data available to measure key performance indicators (KPIs) 				