



LEVER TALENT

AI in HR Tech: RFP Question Set

Put these questions to a vendor in writing, before the sales call

Drop this section into your next HR tech RFP as-is, or send it to a shortlisted vendor as a standalone questionnaire. It's organized around the same 4Cs discipline we use before handing any workflow to an agent we build ourselves, applied here to a vendor's product instead. Written answers here carry more weight than anything said in a demo.

Instructions for HR leaders

Insert your company name and the evaluation deadline before sending. Ask every vendor on your shortlist the identical question set so responses are actually comparable. A vendor who declines to answer a question in writing has answered it.

- ☐ Company: [Your Company Name] — insert before sending.
- ☐ RFP issued: [Date] Response due: [Date]
- ☐ Return completed responses to: [Your Name / Email]

Section 1 — Company & Product Overview

Baseline information about the vendor and the product under evaluation.

Company Name	Product Name	Years in Market	Primary Contact

1. Describe your company's AI capabilities as they apply to HR use cases, including which features are core to the platform and which are optional add-ons.

Vendor Response:

2. Provide two or three client references, ideally in a comparable industry or company size, who can speak to your AI features specifically.

Vendor Response:



C1 Context — *does it know our business, or just its defaults*

How the product can be grounded in the client's own standards rather than running on generic defaults.

3. Describe how your AI features can be configured or fine-tuned using our organization's own documents, policies, or historical data, rather than only generic defaults.

Vendor Response:

4. Describe the process by which a client can review example outputs before go-live to confirm they meet the client's quality and tone standards.

Vendor Response:

C2 Constraints — *training data, bias testing, security, compliance*

What the model is trained on, how it's tested, and current regulatory compliance.

5. Describe how your AI model(s) are trained, including the source and nature of the training data.

Vendor Response:

6. Confirm whether client data, including our employee or candidate data, becomes part of your public training data. If any portion does, specify which.

Vendor Response:

7. Describe how you test your screening, scoring, or evaluation algorithms for bias, and provide the most recent test results or summary you're able to share.



Vendor Response:

8. Confirm whether data is encrypted at rest and in transit, and describe your data residency practices.

Vendor Response:

9. Provide documentation of your most recent third-party security audit (e.g., SOC 2, ISO 27001), including the date completed.

Vendor Response:

10. Describe how your product and its AI features comply with current state and federal employment AI regulations in the jurisdictions where we operate, and how you monitor and update compliance as those laws change.

Vendor Response:



C3 Connections — *what it touches and what crosses the boundary*

Every system the product's AI reads from or writes to, and what governs each connection.

11. List every system, application, or data source your AI features can connect to, and specify for each connection whether it reads data, writes data, or both.

Vendor Response:

12. Describe how a client can scope, restrict, or revoke what data your AI is permitted to access from a connected system.

Vendor Response:

13. Describe what happens to an in-progress workflow if a connection between systems fails, and how the client is notified.

Vendor Response:

14. Describe your process for notifying clients when you add a new integration or expand the data an existing connection can access.

Vendor Response:

15. Confirm whether your implementation process assumes a single point of contact on the client side, or whether it expects joint sign-off from both HR and IT. Describe what that joint ownership looks like in practice.

Vendor Response:



16. For each system connection listed above, describe who is accountable for its security and whether we can opt out of any individual connection.

Vendor Response:

C4 Control — *human override, disclosure, accountability*

Who is accountable on the vendor's side, what a human can override, and what disclosure the product supports.

17. Describe the mechanism by which a human reviewer can override or reverse an AI-generated decision before it takes effect.

Vendor Response:

18. Describe the audit trail your product maintains for AI-assisted decisions, and how a client can access it.

Vendor Response:

19. Name the role or team on your side accountable for AI-related issues, and describe your incident response process and expected response time.

Vendor Response:



20. Describe the disclosure language or notice your product provides (or supports providing) to candidates or employees affected by its AI features.

Vendor Response:

21. Describe your data portability and deletion process if we end the contract, including the timeline for confirming deletion in writing.

Vendor Response:



Commercial & Support

Pricing, roadmap, and the practical terms that don't show up in a product demo.

22. Provide a complete, itemized pricing structure for your AI features specifically, including any usage-based or per-seat costs, and disclose any fees not included in the base price.

Vendor Response:

23. Describe your product roadmap for AI features over the next 12 months, and how you communicate changes to existing clients ahead of release.

Vendor Response:

24. Describe the training, onboarding, and ongoing support provided specifically for AI features, separate from general product support.

Vendor Response:

Vendor Certification

To be completed by an authorized representative of the vendor.

I certify that the responses provided in this document are accurate and complete to the best of my knowledge as of the date signed below, and that I am authorized to respond on behalf of the vendor named in Section 1.

Name	Title	Signature	Date

Want to score responses across vendors?

Pair this with our [4Cs Vendor Evaluation Worksheet](#) to turn the results into a scored recommendation. Learn about this and more in our AI Fluency for HR Masterclass, our two-day course where HR leaders leave with their own AI Wedge and Harness built.

Find your leverage at www.levertalent.com