



LEVER TALENT

The 4Cs Vendor Evaluation Worksheet

Score any AI-enabled HR tech vendor before you sign

Most HR leaders vet a new tool on price and implementation timeline, and never vet the AI already running inside it. This worksheet runs a vendor's AI through the same 4Cs discipline we use before handing any workflow to an agent we build ourselves, so the vetting happens before signature, not after a breach notice.

Why score it

A vendor demo is built to get to signature fast. A scored worksheet forces the questions that don't come up on their own: how the model is trained, what happens to your data, what breaks when a connection fails, and who is accountable when something goes wrong. A red flag doesn't automatically disqualify a vendor. It tells you what to negotiate before you sign.

The four Cs, applied to a vendor

C1 Context <i>Does it know your business, or just its defaults</i>	C2 Constraints <i>Training data, bias testing, security, compliance</i>	C3 Connections <i>What it touches and what crosses the boundary</i>	C4 Control <i>Human override, disclosure, accountability</i>
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How to use it

- ☐ One worksheet per vendor. If you're comparing three vendors, score all three before you decide.
- ☐ Ask every question, even the ones the vendor answered unprompted in the demo. Get it in writing here, not just verbally in a sales call.
- ☐ A vendor who can't answer a question isn't automatically disqualified. Mark it and negotiate it into the contract.
- ☐ Bring a completed worksheet into any contract negotiation. It's your leverage, not just your notes.

Vendor Overview

Basic identifying information before you get into the 4Cs.

Vendor / Product	Primary Contact	Date Reviewed	Reviewed By



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

Whether the tool can be grounded in your business, or only runs on generic defaults with no way to customize.

#	Ask the Vendor	Vendor's Answer (summarize)	Status
1	Can the tool be configured or fine-tuned using our own documents, policies, or data, rather than only generic defaults?		☐ Confirmed ☐ Red flag ☐ N/A
2	Does the vendor let us review example outputs before deployment, so we can confirm they match our standards?		☐ Confirmed ☐ Red flag ☐ N/A
3	Has the vendor clearly identified which AI features are core to the platform versus optional add-ons we aren't using?		☐ Confirmed ☐ Red flag ☐ N/A

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

What the model is trained on, how it's tested, and whether the vendor's compliance claims hold up against the current law, not last year's.

#	Ask the Vendor	Vendor's Answer (summarize)	Status
1	How is the vendor's AI model trained, and on what data?		☐ Confirmed ☐ Red flag ☐ N/A
2	Does our proprietary employee or candidate data become part of the vendor's public training data?		☐ Confirmed ☐ Red flag ☐ N/A
3	How does the vendor test for bias in its screening or scoring algorithms, and will they share the results?		☐ Confirmed ☐ Red flag ☐ N/A
4	Is data encrypted both at rest and in transit?		☐ Confirmed ☐ Red flag ☐ N/A
5	Has the vendor completed a third-party security audit, such as SOC 2 or ISO 27001, within the last 12 months?		☐ Confirmed ☐ Red flag ☐ N/A
6	Can the vendor confirm their AI use complies with the current employment AI laws in every state where we operate, not just where they're headquartered?		☐ Confirmed ☐ Red flag ☐ N/A

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

Every system this vendor's AI reads from or writes to, and what happens at each boundary.

#	Ask the Vendor	Vendor's Answer (summarize)	Status
1	What systems does this AI connect to, and can we see a full list of what data it reads and writes?		☐ Confirmed ☐ Red flag ☐ N/A
2	Can we scope or restrict what data the AI is allowed to pull from a connected system?		☐ Confirmed ☐ Red flag ☐ N/A
3	What happens to a workflow if a connection between systems fails or is revoked?		☐ Confirmed ☐ Red flag ☐ N/A
4	Does the vendor disclose when they add a new integration or expand what an existing connection can access?		☐ Confirmed ☐ Red flag ☐ N/A
5	Is there a named owner for this vendor relationship on both the HR and IT side, not just one?		☐ Confirmed ☐ Red flag ☐ N/A
6	For each connection, who is accountable for its security, and can we opt out of it individually?		☐ Confirmed ☐ Red flag ☐ N/A



C4 Control — human override, disclosure, accountability

Who is accountable on the vendor's side, what a human can override, and what candidates or employees are told.

#	Ask the Vendor	Vendor's Answer (summarize)	Status
1	Can a human override or reverse an AI-generated decision before it takes effect?		☐ Confirmed ☐ Red flag ☐ N/A
2	Does the vendor maintain an audit trail we can access for every AI-assisted decision?		☐ Confirmed ☐ Red flag ☐ N/A
3	Is there a named, reachable contact on the vendor's side accountable for AI-related issues?		☐ Confirmed ☐ Red flag ☐ N/A
4	What disclosure language does the vendor provide for candidates or employees affected by its AI?		☐ Confirmed ☐ Red flag ☐ N/A
5	If we end the contract, can we get our data back and get written confirmation it's deleted from the vendor's systems?		☐ Confirmed ☐ Red flag ☐ N/A

Overall Recommendation

RED FLAGS TO NEGOTIATE

List every item marked Red Flag above. These go into the contract redline, not just this worksheet.

RECOMMENDATION

Proceed, proceed with contract conditions, or don't proceed. Say which, and why, in a sentence a colleague who wasn't in the room could act on.

Completed by



Name	Role	Date	Vendor Name

Want to put these same questions in front of the vendor?

Pair this worksheet with our [AI in HR Tech RFP Question Set](#), built to drop directly into a vendor RFP. 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