

*critical
capabilities
for evaluating
your AI agent:
RFP template*

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introduction

Use this as a guide to inform your RFP process and evaluate vendors for your customer service automation strategy. Take into account the key features and qualities of a vendor that will deliver on your needs.

This tool will help you:

- Structure the evaluation of customer service automation vendors.
- Ask the right questions that map to your automation goals and business outcomes.
- Speed up your selection process to get your conversational AI up and running faster.

1. context (template)

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letter template

[Company] is seeking to deploy a customer service automation strategy across multiple lines of business **[or specify the line of business]** and across multiple geographies **[list]** and channels **[list]**.

The number of interactions with customers is growing at a faster rate than our team can keep up. **[Company]** is seeking a vendor to partner with in building a best-in-class **[Customer experience]**.

[Company]'s goal is to reduce time to first response and automate **[XX% of interactions]** for customers and employees. This will provide the opportunity for the people on the team to focus on the most complex issues. This will also help us deliver extraordinary **[Customer]** experiences.

The current customer interactions on average per month total:

[###] from phone
[###] from email
[###] from chat

The current technology environment for interactions includes:

[Live chat platform]
[Email ticketing]
[CCaaS platform]
[CRM]
[Knowledge Base]

For this initiative, we are seeking to systematically reduce time to resolution and support costs, while maintaining or improving customer satisfaction.

The point of contact for this RFP will be:

[Point of Contact, ###-###-####, Email@email.com].



2. features

chatter (customer) experience

- Does the AI Agent consistently deliver a natural conversational experience without using scripted, generic answers?
- Does it consider the full context of the conversation when generating replies?
- Can it handle multi-intent questions (e.g. two-part questions) seamlessly?
- Can it support multiple channels (web messaging, in-app, social media) and modalities (chat, email, voice)?
- Does it offer a single UI handoff experience for passing chatters from automation to agents/ reps?
- Can it expedite resolution by providing agents a summary and topics of the bot interaction?

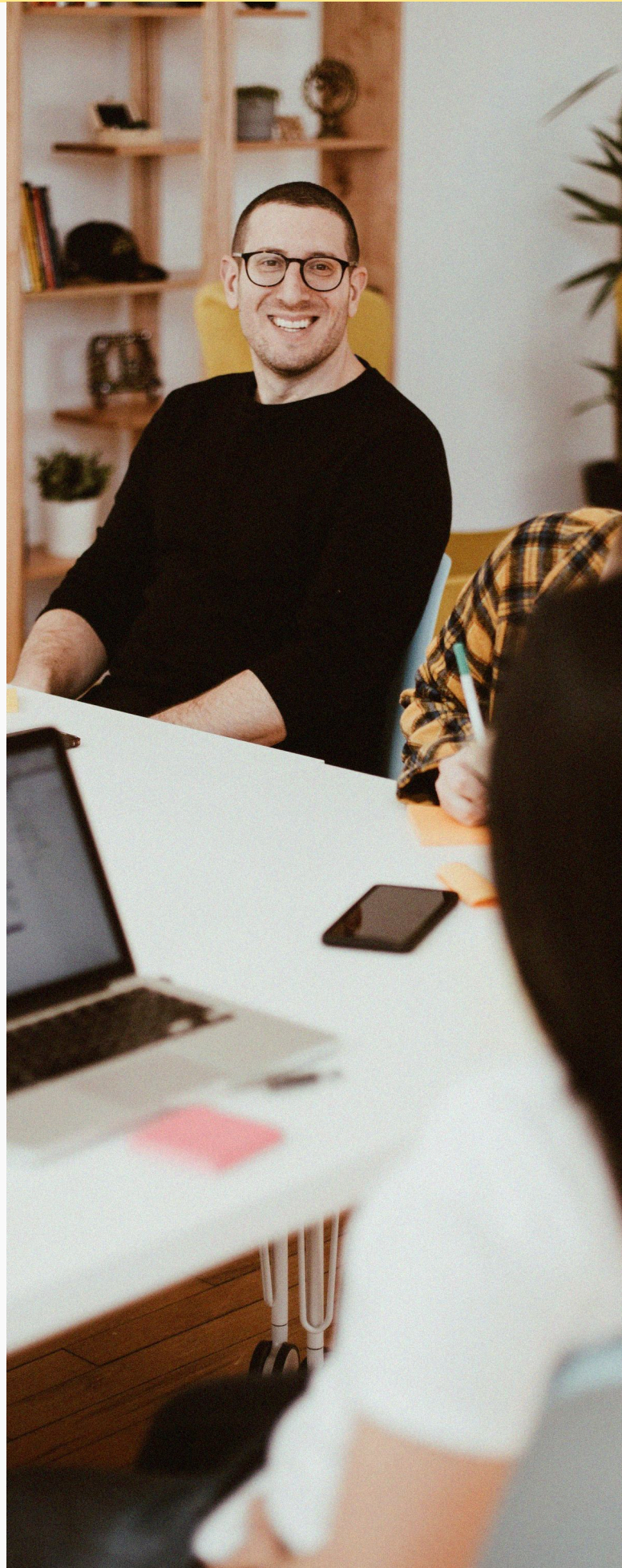


- Does it have conditional and departmental routing capabilities?
- Does it offer the ability to handoff to multiple agent/help platforms from one entry point?
- How many languages does it support?
- Does it auto-recognize the customer's language?
- Can the platform comprehend synonyms, spelling errors and slang?
- Can the platform capture customer satisfaction data across the entire conversation?
- Can the user interface (UI) of the interaction reflect your brand's visual identity?
- Can chatters authenticate their identity in the chat solution?

2. features

AI manager experience

- What is the estimated number of FTE developer hours required to bring a new deployment of the solution live?
- What type of developer/programming roles/resources are required to deploy and manage the platform?
- Can it ingest a knowledge base and use it to generate fully personalized replies to unique customer inquiries?
- Do knowledge base integrations sync automatically?
- Does each language require separate content?
- Are there specific questions that require building generic, scripted, decision-tree oriented answers, instead of using generative AI?
- How are audiences able to be segmented in the case of unique content/information for specific groups of users?
- How is feedback provided to improve the performance of the solution? Is it possible to provide guidance in natural language?



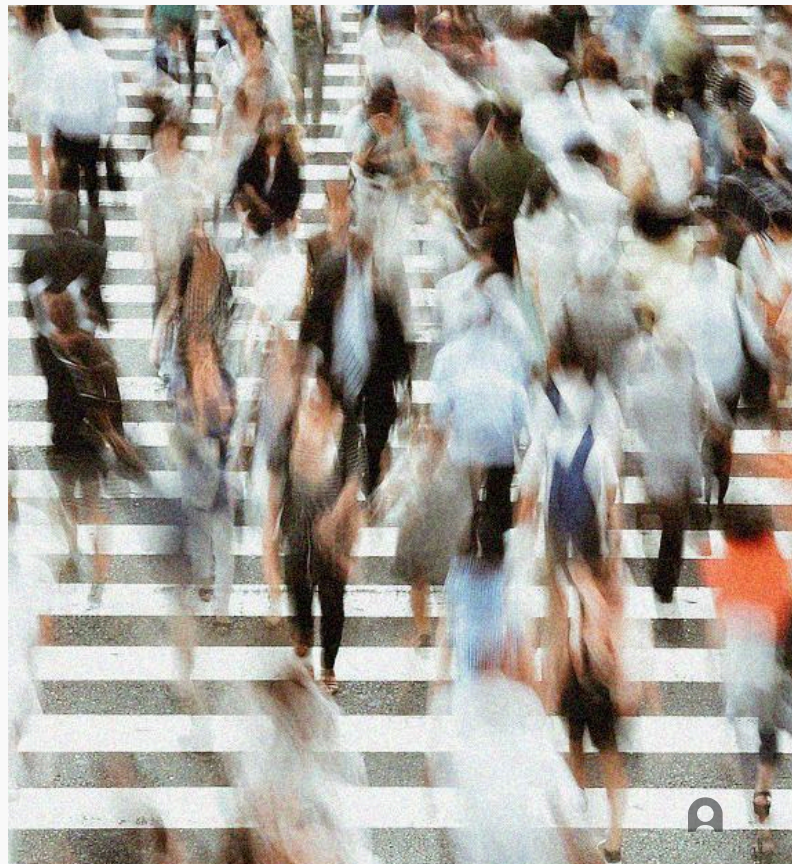
2. features



vendor experience

- What is the vendor's team size?
- How many work in engineering?
- How many customers does the vendor have on the AI Agent in your industry?
- Can the vendor share 1-2 customer references?
- Please describe how the vendor is funded for long-term partnership.
- What key metrics do you typically expect to achieve with the deployment of the solution within 30 days?
- Is there a guided process for onboarding and ongoing support?
- Has the vendor supported other similarly sized brands?
- Does the vendor have a well-defined process for customer feedback and roadmap planning?

- What is the vendor's process to build a strategy that drives business KPIs from the bot?
- Does the vendor offer regular product training on features and implementation?
- Does the vendor offer access to documentation that allows for a self-guided approach?
- Is there a community to interact with and learn from other AI Managers?
- Are there asynchronous learning resources for self-service learning?
- Does the platform offer automated, 24/7 support inside of the dashboard?
- If there are unique needs, does the vendor offer in-house professional services to support delivery?



2. features



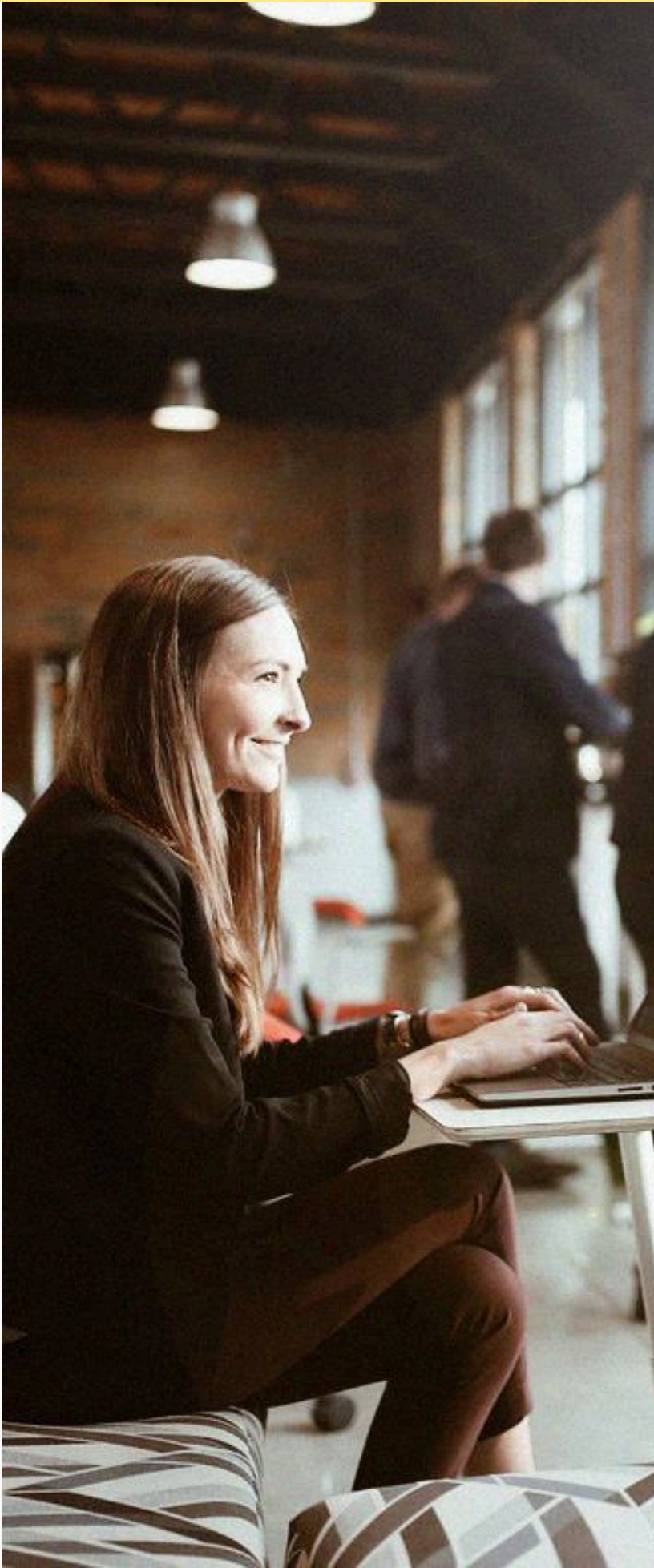
integrations & handoffs

- What integrations does the platform offer to Agent Platforms?
- Does the platform pass a transcript of the conversation to agents?
- Does the platform offer a summary to expedite the agent response time?
- What is the process to configure and maintain any integrations required to deploy the platform?
- What level of effort is required, on average to integrate with a single system (in hours)?
- Please describe any limitations integrating the platform to external software solutions
- What level of technical resources are required to build and maintain an API integration?

2. features

reporting & measurement

- Does the AI Agent platform include built-in analytics dashboards and reports?
- Can reports be filtered to a granular level with chatter variables?
- What insights and reports are generated based on conversation data?
- Does the AI Agent platform offer an API to export data into Business Intelligence tools?
- Are visualized analytics included for: automation rate, conversion rate for events, drop-off points, CSAT, improvement opportunities?
- Does the AI Agent use Large Language Models to analyze conversations and generate topic clustering, trends and insights?
- Does the AI Agent use Large Language Models to assess the quality of conversations and measure the rate of automation success beyond simple deflection?



2. features

machine learning

- What large language models are used, and from what vendors? How were these selected?
- What is the vendor's approach to selecting appropriate models for specific tasks?
- Is the AI Agent reliant on the availability of a specific model?
- What fallback mechanisms are in place in the event of downtime from one of the platform's vendors?

architecture

- Is the platform a SaaS platform?
- If so, where is the platform hosted?
- Does the platform offer mobile SDKs?
- How long does it take to set up a mobile experience?
- Does the solution allow for concurrent users?
- How does the solution handle large fluctuations in conversations?
- What is your average system uptime over the last 12 months?



2. features



info-sec

- Is the AI Agent platform compliant with the following?
 - SOC
 - PIPEDA
 - GDPR
- Has a recent penetration test been completed by a third party?
- Are there different roles for users to allow for collaboration and governance of the AI Agent?
- Does the AI Agent platform store and protect customer data in a secure and isolated manner?
- Is conversational data encrypted, both in transit and at rest?



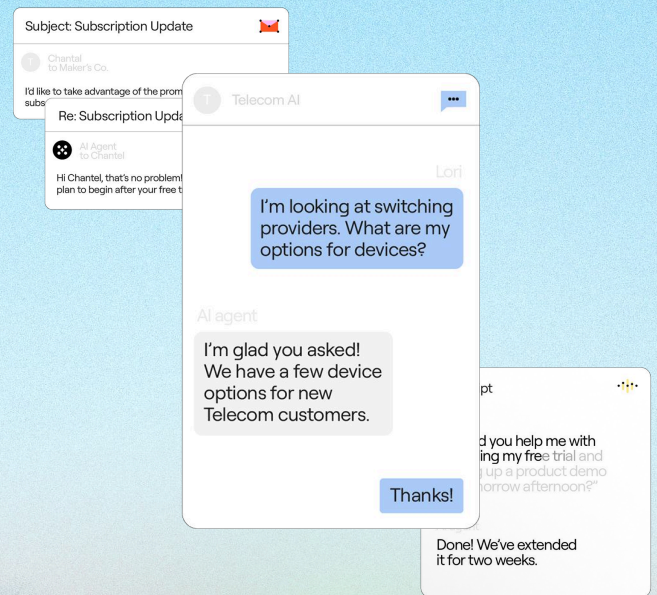
good luck on your
RFP journey

You can contact us at sales@ada.support if you have any questions, or if you want us to respond to your RFP.



meet your new AI agent for customer service

With ada, you get a platform that empowers you to deliver efficient, high-quality support at scale—continuously improving the speed and quality of results across all channels and languages, 24/7.



5.5B

customer interactions
powered

8X

more productive
than human agents

83%

up to 83% of
conversations
autonomously
resolved

99.9%+

uptime of
uninterrupted service

accelerate your business with AI

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