

FREE TEMPLATE

AI Vendor Self-Audit Template

Run your own first-pass audit before hiring anyone. Answer every question you can; leave blanks where you are unsure - the blanks are the finding.

Step 1 - Inventory every AI tool

- ☐ List every AI-enabled tool, chatbot, transcription bot, browser extension, and SaaS copilot in use - including personal accounts used for work.
- ☐ For each: who signed up, what it costs, and what data it touches.
- ☐ Check expense reports and SSO logs for tools nobody approved.

Step 2 - Check vendor data rights

- ☐ Does the vendor train its models on your data? Find the exact clause.
- ☐ Is a zero-data-retention or enterprise tier available? What does it cost?
- ☐ Who are the vendor's sub-processors, and where are they located?
- ☐ What happens to your data when you cancel?

Step 3 - Map where your data goes

- ☐ Which tools can see customer PII, financials, or proprietary files?
- ☐ Are prompts, transcripts, or uploads retained? For how long?
- ☐ Does any regulated data (health, financial, children's) reach a tool without the required agreement in place?

Step 4 - Score and rationalize

- ☐ Mark each tool Keep, Reconfigure, or Retire.
- ☐ Flag overlapping subscriptions - duplicates are pure cost.
- ☐ Estimate annual spend on tools marked Retire.
- ☐ Assign an owner and a deadline to every Reconfigure item.

Scoring sheet

Tool	Data touched	Trains on data?	Decision	Annual cost

If Step 2 or Step 3 surfaced blanks you cannot fill, that is where an independent assessment pays for itself. Cijara Group LLC - cijaragroup.com - CustomerInquiry@cijaragroup.com