How to evaluate AI tools for your business

Discover how to choose the right AI tools for your business by focusing on what really matters: your goals, your systems, and your return on investment.

In this guide, we look at the key features, challenges, and decision points business owners should consider before investing in AI.

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Welcome

Dear business leaders,

AI tools are becoming more accessible, but that doesn't make them easier to evaluate. With new platforms launching by the week and capabilities evolving just as fast, it can be hard to know what's worth your time, investment, and trust.

In this guide, we outline practical ways to evaluate AI tools based on your business goals, how to measure impact, and what questions to ask before committing to any platform.

We hope this guide helps you move forward with clarity and confidence as you explore how AI can support your growth, now and into the future.

The Credibly team

What to keep in mind when evaluating AI tools

AI can streamline operations, boost output, and save time, but only if it's aligned with what you actually need.

Before you choose a tool, it's important to define your objectives and understand how you'll measure success. Are you looking to reduce errors, speed up a process, or improve service quality?

What to measure when evaluating AI tools:

Accuracy: Measures how often the AI gets it right overall. Useful for understanding general reliability.

Precision: Tells you how many of the tool's positive results are actually correct. Important when false positives are costly.

Recall: Shows how well the tool captures all the relevant positive results. Key when missing something critical would cause problems.

F1 score: Combines precision and recall into a single performance measure. Helpful when you need to balance both accuracy and completeness.

How to calculate F1 score:

$$\text{F1 Score} = 2 \times \frac{\text{Precision} \times \text{Recall}}{\text{Precision} + \text{Recall}}$$

These metrics help you confirm whether an AI tool is delivering results that align with your goals, and whether it's worth your investment.

General best practices for evaluating AI tools for your business

1. WHAT TYPES OF AI POWER THE TOOL?

The type of AI behind a tool shapes everything, from setup to results.

Before you commit, find out what powers the system. Is it built on simple rule sets, trained machine learning models, deep learning, or a mix of methods? Does it require access to your data to improve, or is it already trained and ready to go?

You should also understand what the tool actually does. Is it adding real business value by integrating with your systems or training on your data? Or is it just a thin layer on top of a public LLM? If it's the latter, ask yourself why you wouldn't just use that LLM directly.

Also consider how much your team will need to interact with or support the tool over time. Some platforms evolve with minimal input. Others demand constant feedback and supervision. Know what you're signing up for.

2. WHERE DOES THE DATA COME FROM?

The quality of the tool depends on the quality of the data feeding it.

Start by checking what kind of data the AI uses and where it comes from. Is it verified and reliable? Does it reflect your industry, audience, or workflows?

Biased or outdated inputs lead to poor results. Make sure the data is diverse enough to avoid blind spots and specific enough to apply to your business.

General best practices for evaluating AI tools for your business

3. HOW DOES THE MODEL PERFORM?

AI is only as good as the outcomes it delivers, and those need to be measurable.

Don't settle for vague promises. Ask for the metrics that show how the model actually performs. That includes accuracy, precision, recall, and F1 score.

What matters most depends on your use case. If the cost of a false alert is high, prioritize precision. If catching every relevant issue matters more, focus on recall.

Above all, make sure the vendor is transparent about how they define and track success. You can't improve what you can't measure.

4. HOW DOES THE TOOL CONTINUE TO LEARN?

AI performance isn't static, so the learning process matters.

Some tools keep getting smarter with help from your team. Others rely entirely on vendor updates. Before investing, find out how the system evolves.

Does it include human oversight to guide or correct responses? Will your staff need to provide regular feedback? And if so, who on your team has the time or the skills to support that?

Ask how often the model is refreshed. A tool that doesn't learn over time can quickly fall behind. One that relies too heavily on your input may drain resources you can't spare.

Knowing how the tool adapts helps you plan for what's needed to keep it working and improving.

A good AI tool should evolve with your business. Make sure it's flexible enough to handle shifting priorities and new use cases down the line. If it's built for short-term gains only, you risk investing in something that gets shelved with the next model update.

Whichever tool you choose should adapt with your use case. You need something more than the pilot of a test model that runs the risk of being put out of commission in the next update.

AI tools for finance

AI is helping businesses make faster, smarter financial decisions without the usual bottlenecks.

1 Real-time visibility matters

If you're still waiting on manual data pulls or spreadsheets to close the books, you're already behind. AI tools like financial data aggregators and voice-based assistants can pull your numbers from tools like Excel, QuickBooks, or Salesforce. This keeps everything current, connected, and centralized.

2 Smarter reporting with less effort

Need a dashboard for a leadership meeting or a chart for your next investor call? AI-powered reporting tools can auto-generate visuals, build presentations, and adjust reports on the fly. Some platforms even offer chatbots that let you ask for a specific metric and get a chart back in seconds.

3 Built for your team, not just your IT department

AI shouldn't require a developer to operate. Many finance platforms now include no-code interfaces, giving your team the power to analyze, filter, and track key data points on their own. For more technical users, advanced layers allow for custom modeling or integrations.

4 Scales with your business

Your financial setup won't look the same a year from now. That's why modern AI platforms offer customizable dashboards, flexible metric tracking, and support for different revenue streams and cost structures. If you're subscription-based, project-driven, or managing multiple business units, the right AI tool can flex with your growth.

AI tools for marketing and sales

From content creation to prospecting, AI is streamlining how teams connect with customers.

1 **MARKETING:** Create smarter content, faster

AI writing assistants and SEO-driven content platforms can help your team generate content that performs. Some tools use real-time keyword data from platforms like Semrush to suggest high-performing topics, structure your articles, and score them for search visibility.

Need help staying on-brand? Many writing tools now learn your tone by analyzing past content. Whether you're creating emails, blog posts, or product descriptions, AI voice-match technology can keep your brand consistent across formats.

To speed up production, look for AI content tools that plug directly into platforms you already use, like Google Docs, WordPress, or Notion. Built-in collaboration features make it easier to create, review, and publish without slowing your workflow.

2 **SALES:** Find leads and close faster

AI-powered lead gen tools are cutting hours out of prospecting. Think of voice-enabled search assistants to smart data platforms. You can now identify decision-makers, surface intent data, and build lists without clicking through endless filters.

These tools provide job titles, company size, buying signals, and even competitor tech stacks, helping your reps prioritize high-potential leads. Some platforms even sync directly with your CRM or outreach tools, making it easier to act fast.

Most importantly, modern AI systems pull from verified data sources and include built-in compliance checks. That means fewer bounced emails, fewer privacy issues, and more productive conversations from the start.

AI tools for customer service and support

AI is helping support teams work faster, respond smarter, and deliver better experiences without burning out.

1 Handles conversations without hand-holding

Today's AI customer support platforms go beyond scripted responses. For example, you can have a chatbot on your website or a voice agent on your phone line. These tools can manage real conversations, answer FAQs, guide users, and even troubleshoot in real time.

More advanced systems use natural language processing to personalize answers and respond more like a human. Many can also switch between multiple languages automatically, making them ideal for global audiences.

2 Makes your team more effective

AI doesn't just help your customers; it helps your staff too. Internal support bots and smart assistants can suggest replies, surface documentation, and provide quick context so agents don't waste time digging. That means fewer delays and more accurate responses, even for complex questions.

These tools can also keep learning from past interactions, so your agents get better suggestions over time.

3 Knows when to escalate and how to stay transparent

Great AI support doesn't try to do it all. The best platforms clearly let customers know they're talking to a bot and offer smooth handoffs to human agents when things get tricky.

Look for systems that route complex issues to the right person without making customers repeat themselves. This saves time, improves satisfaction, and helps your team focus on the problems that really need a human touch.

AI tools for your supply chain

From smarter planning to fewer delays, AI is helping supply chains run leaner and more predictably.

1 Better decisions backed by live data

AI planning platforms and logistics assistants use real-time inputs, like fuel costs, delivery windows, and regional delays, to help you make smarter calls on the fly. Some tools can simulate different "what-if" scenarios, so you can understand the impact of supply interruptions, tariffs, or demand spikes before they hit.

These tools are especially useful for procurement and logistics managers who need visibility across vendors, carriers, and timelines all in one place.

2 Less manual work, and more automation

Gathering and analyzing supply chain data used to take days. Now AI-based workflow tools and predictive dashboards do it for you, automatically pulling reports, flagging anomalies, and organizing insights.

If it's tracking raw material availability or monitoring warehouse activity, these systems cut down on spreadsheet wrangling and speed up decision-making.

3 Optimized for efficiency and savings

AI routing tools can reduce fuel costs and idle time by suggesting more efficient delivery paths and loading plans. Some platforms can even detect when shipments are running under capacity and recommend adjustments to reduce waste or improve delivery performance.

If you're dealing with perishable goods or time-sensitive deliveries, these optimizations can make a major impact.

4 Adapts to risk and to growth

Modern AI tools like transportation optimization factor in risks like weather, strikes, or geopolitical events and adjust your supply strategy accordingly. That means fewer surprises and faster response times when disruptions hit.

When your shipping volume increases or your supplier network expands, the right AI system will scale with you.

AI tools for productivity

AI helps you get your time back and keeps your team aligned.

1 Keeps work organized without extra effort

AI-powered task managers and productivity assistants can automatically schedule work based on real availability, upcoming deadlines, and shifting priorities. These tools pull from your calendar, project board, and even your inbox, keeping meetings, deliverables, and follow-ups in sync.

Some even include voice agents or chatbot interfaces, letting you add tasks on the fly without pausing your day.

2 Easy for your entire team to adopt

Look for tools that integrate with platforms your team already uses, like Google Workspace, Outlook, or Slack. Many AI productivity platforms allow seamless task input via email, chat, or even a mobile voice command.

3 Improves planning and team visibility

Project planning platforms powered by AI help managers map out clear timelines, assign responsibilities, and monitor capacity in real time. Employees get a clearer picture of what's due and when.

Whether you're managing a small team or multiple departments, these tools make collaboration easier and more transparent.

4 Built to grow with your business

Scalability matters. The best AI productivity platforms adjust to handle more users, more projects, and more complexity without slowing you down.

If you're launching your tenth product or hiring your hundredth employee, your systems should be ready to keep up.

The right AI tool should save you time. You're juggling meetings, deadlines, or cross-functional projects; a solid productivity platform keeps your team focused and your operations moving.

AI is one tool for business growth. Financing is another essential.

At Credibly, we help small businesses move fast with funding options that adapt as you do. No jargon. No endless paperwork. Just real support, when you need it.

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