

FREE TEMPLATE

CHISOKU LAB

AI Tool Evaluation Checklist

Personal Adoption Edition — Evaluate any AI tool before you commit your time

Tool Name: _____

Category: _____

Date Evaluated: _____

SECTION 1: Purpose Fit

Before evaluating features, confirm the tool solves a real problem.

- **I can clearly name the problem this tool solves for me.**
e.g. I spend 3 hrs/week writing reports — this automates it.
- **This tool addresses a Type 3 (Mechanical) or Type 2 (Operational) task.**
Strategic decisions should stay with you. See Three Types Framework.
- **I have tried solving this problem manually and confirmed it's worth automating.**
- **This tool solves ONE clear problem — not a vague 'productivity boost'.**

My specific use case for this tool:

SECTION 2: Tool-Specific Evaluation

ChatGPT (OpenAI)	Writing, summarising, brainstorming, drafting emails, Q&A;	■ Yes ■ No
Claude (Anthropic)	Long-form analysis, nuanced reasoning, document processing	■ Yes ■ No
Gemini (Google)	Research, Google Workspace integration, multimodal tasks	■ Yes ■ No
Perplexity AI	Real-time web research with citations	■ Yes ■ No
Notion AI	Notes, project management, knowledge base within Notion	■ Yes ■ No
Otter.ai	Meeting transcription and summarisation	■ Yes ■ No
n8n	Workflow automation between apps (no-code/low-code)	■ Yes ■ No
Zapier	Simple app-to-app automation triggers	■ Yes ■ No
Make (Integromat)	Visual workflow automation, more complex than Zapier	■ Yes ■ No
GitHub Copilot	AI code completion and pair programming	■ Yes ■ No

Midjourney	AI image generation for design and visual content	<input type="checkbox"/> Yes <input type="checkbox"/> No
Runway	AI video generation and editing	<input type="checkbox"/> Yes <input type="checkbox"/> No
Other:	_____	<input type="checkbox"/> Yes <input type="checkbox"/> No

SECTION 3: Evaluation Criteria (Rate 1–5: 1 = Poor, 5 = Excellent)

Ease of Use	Can I get value from it within 30 minutes of trying?	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5
Output Quality	Does the output actually replace or improve my current process?	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5
Time Saved	Does it genuinely save me measurable time per week?	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5
Learning Curve	Is the effort to learn it justified by the benefit?	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5
Privacy & Security	Am I comfortable with what data I'm sending to this tool?	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5
Cost vs. Value	Does the free tier work? Is the paid tier worth it for my use?	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5
Reliability	Does it work consistently, or does it break my workflow?	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5
Integration	Does it plug into the tools I already use?	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5

Total Score: _____ / 40 (32–40 = Strong Adopt | 20–31 = Pilot First | Below 20 = Skip)

SECTION 4: Decision Impact Check

AI tools that multiply decisions cost more energy than they save. Check carefully.

- This tool reduces decisions — it doesn't create new ones.**
 e.g. auto-routes tickets vs. asking you to choose routing rules daily
- I know exactly when I will use this tool (specific trigger).**
 e.g. Every time I write a status report / Every meeting I attend
- I have estimated how many new decisions this tool creates per week.**
 Write the number: _____ new decisions/week
- The new decisions it creates are worth the time saved.**
 Time saved: _____ hrs | New decision overhead: _____ hrs
- I have a plan to review this tool's value after 30 days.**
 Review date: _____

SECTION 5: Final Verdict

<input type="checkbox"/> ADOPT	Score 32+, passes decision check, clear use case.	<input type="checkbox"/> PILOT (30 days)	Score 20–31, promising but unproven for my workflow.
<input type="checkbox"/> REVISIT LATER	Not the right time — revisit in 90 days.	<input type="checkbox"/> SKIP	Score below 20, doesn't justify the overhead.

My reason for this verdict:

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AI Tool Evaluation Checklist

Enterprise Adoption Edition — Evaluate AI tools before team or org-wide rollout

Tool Name: _____ Department: _____ Evaluator: _____ Date: _____

SECTION 1: Business Case & Problem Definition

- **A specific business problem has been clearly defined.**
Not 'we want to use AI' — a measurable problem.
- **The problem affects 3+ team members or is high-frequency.**
Low impact problems don't justify enterprise rollout.
- **Current process has been documented before evaluating tools.**
Never adopt a tool without understanding the current process.
- **Success metrics have been defined upfront.**
e.g. Reduce report generation time from 4 hrs to 30 min.
- **A business case exists with estimated ROI.**
Time saved x hourly cost x team size.

Problem statement (one sentence):

Estimated ROI: Time saved _____ hrs/week x Team size _____ = _____ hrs/week recovered

SECTION 2: Tool Shortlist — Enterprise-Grade AI Tools

Tool Name	Provider	Key Capabilities / Use Cases	Selected
ChatGPT Enterprise	OpenAI	Writing, analysis, coding, data — with enterprise data privacy	■ Yes ■ No
Claude for Work	Anthropic	Long documents, policy analysis, complex reasoning at scale	■ Yes ■ No
Microsoft 365 Copilot	Microsoft	Deep Office/Teams/Outlook integration, enterprise native	■ Yes ■ No
Google Workspace AI	Google	Gmail, Docs, Sheets, Meet — Google ecosystem teams	■ Yes ■ No
Salesforce Einstein AI	Salesforce	CRM automation, sales insights, customer data AI	■ Yes ■ No
ServiceNow AI	ServiceNow	IT/HR service desk automation and ticket routing	■ Yes ■ No
n8n (self-hosted)	n8n	Workflow automation — preferred for full data control	■ Yes ■ No
Zapier Teams	Zapier	Cross-app automation, easier setup than n8n	■ Yes ■ No

Make Business	Make	Visual automation, complex multi-step workflows	■ Yes ■ No
Power Automate	Microsoft	Microsoft-native automation, RPA capabilities	■ Yes ■ No
GitHub Copilot Business	GitHub	Enterprise code assistance with org-level controls	■ Yes ■ No
Glean	Glean	Enterprise search + AI across all company tools	■ Yes ■ No
Other:		_____	■ Yes ■ No

SECTION 3: Enterprise Evaluation Criteria (Rate 1–5)

		■1 ■2 ■3 ■4 ■5	■1 ■2 ■3 ■4 ■5
Data Security & Privacy	SOC 2, GDPR compliance. Does data leave your org?	■1 ■2 ■3 ■4 ■5	■1 ■2 ■3 ■4 ■5
Enterprise Support	SLA, dedicated support, onboarding assistance available?	■1 ■2 ■3 ■4 ■5	■1 ■2 ■3 ■4 ■5
Admin & Access Controls	Role-based access, audit logs, user provisioning (SSO)?	■1 ■2 ■3 ■4 ■5	■1 ■2 ■3 ■4 ■5
Integration Depth	API available? Connects to your stack (n8n/Make/Zapier)?	■1 ■2 ■3 ■4 ■5	■1 ■2 ■3 ■4 ■5
Scalability	Works for 10 users today, 500 users next year?	■1 ■2 ■3 ■4 ■5	■1 ■2 ■3 ■4 ■5
Vendor Stability	Is this company/product likely to exist in 3 years?	■1 ■2 ■3 ■4 ■5	■1 ■2 ■3 ■4 ■5
Total Cost of Ownership	License + implementation + training + maintenance costs?	■1 ■2 ■3 ■4 ■5	■1 ■2 ■3 ■4 ■5
Change Management Effort	How disruptive is this to current workflows?	■1 ■2 ■3 ■4 ■5	■1 ■2 ■3 ■4 ■5
Output Quality	Does it actually solve the problem at enterprise scale?	■1 ■2 ■3 ■4 ■5	■1 ■2 ■3 ■4 ■5
Adoption Likelihood	Will your team actually use this consistently?	■1 ■2 ■3 ■4 ■5	■1 ■2 ■3 ■4 ■5

Total Score: _____ / 50 (40–50 = Proceed to Pilot | 25–39 = Needs Review | Below 25 = Do Not Proceed)

SECTION 4: Risk & Governance Checklist

- Legal has reviewed data processing agreements with the vendor.
- IT security team has approved the tool for use on company systems.
- A clear acceptable use policy has been drafted for this tool.
e.g. What data can employees input? What can't they?
- An owner has been assigned to manage this tool post-adoption.
Tool without an owner = tool that goes rogue.
- A fallback process exists if the tool goes down or is discontinued.
- A 30-day pilot plan exists before full rollout.
Pilot team: _____ Size: _____
- Training plan for all users has been outlined.
Estimated training time per user: _____
- A 90-day review date has been set to evaluate ROI vs. baseline.
Review date: _____

SECTION 5: Final Recommendation

■ APPROVE PILOT	Score 40+, passes governance. Run 30-day pilot.	■ CONDITIONAL	Score 25–39. Address gaps before pilot.
■ DEFER 90 DAYS	Timing or budget not right. Revisit.	■ DO NOT PROCEED	Score below 25 or failed governance.

Recommended by:

Key conditions or next steps:
