

# AI Tool Evaluation

## *Checklist*

15 questions to ask before buying any AI tool for RevOps.

Use this to avoid “AI theater” and select tools that create measurable revenue leverage.

### HOW TO USE

Run through each question with your team before purchasing or renewing any AI tool for revenue operations. If you can't confidently answer “Yes” to the majority within a section, pause and address the gaps first.



## 01 Value & Workflow Fit

QUESTION	YES	NO / UNSURE
Can I point to a specific workflow that this tool replaces or accelerates (in plain English), and who owns that workflow today?	<input type="checkbox"/>	<input type="checkbox"/>
Will this tool improve a revenue outcome we already track (forecast accuracy, conversion, cycle time, CAC, GRR/NRR), or only generate activity?	<input type="checkbox"/>	<input type="checkbox"/>
Does it remove a true bottleneck, or just add a new UI on top of existing tools?	<input type="checkbox"/>	<input type="checkbox"/>
Can we pilot it in 2 weeks with a measurable before/after, without a large implementation project?	<input type="checkbox"/>	<input type="checkbox"/>

## 02 Data, Security & Governance

QUESTION	YES	NO / UNSURE
What data does it need (CRM, calls, tickets, product usage), and can we provide it safely and cleanly?	<input type="checkbox"/>	<input type="checkbox"/>
How does it handle sensitive information (PII, deal notes, call recordings)? What is stored vs. transient?	<input type="checkbox"/>	<input type="checkbox"/>
Does the vendor support enterprise controls (access control, audit logs, retention policies, SSO), and do we actually need them?	<input type="checkbox"/>	<input type="checkbox"/>
How does it protect against common LLM risks (prompt injection, sensitive data leakage, excessive agent autonomy)?	<input type="checkbox"/>	<input type="checkbox"/>



### 03 Quality & Reliability

QUESTION	YES	NO / UNSURE
What are the expected failure modes, and what is the human-in-the-loop design when it is wrong?	<input type="checkbox"/>	<input type="checkbox"/>
Can we inspect and correct outputs (traceability, sources, citations, confidence signals), or is it a black box?	<input type="checkbox"/>	<input type="checkbox"/>
How does it behave on edge cases (new segments, new products, unusual deal shapes, custom fields)?	<input type="checkbox"/>	<input type="checkbox"/>

### 04 Economics & Vendor Risk

QUESTION	YES	NO / UNSURE
What is the real ROI model (time saved × fully loaded cost, revenue lift probability, risk reduction), and what has to be true for it to pay off?	<input type="checkbox"/>	<input type="checkbox"/>
What is the pricing model, and does usage-based pricing create runaway costs in heavy workflows?	<input type="checkbox"/>	<input type="checkbox"/>
What happens if we churn the tool in 6 months — can we export data, prompts/config, and preserve continuity?	<input type="checkbox"/>	<input type="checkbox"/>
Who inside our org owns adoption, training, and measurement so this doesn't die after week two?	<input type="checkbox"/>	<input type="checkbox"/>

**THE BOTTOM LINE**

If you can't name the **workflow owner**, the **baseline metric**, and the **two-week pilot plan**, don't buy yet.

### Need help evaluating your *AI-readiness*?

ClearPath's Revenue AI Readiness Assessment is a 2–3 week operator-grade diagnostic that maps your revenue architecture, identifies high-ROI AI opportunities, and delivers a prioritized 90-day transformation roadmap.

**Book a discovery call → [clearpath-revenue.com](https://clearpath-revenue.com)** • 30 minutes. No deck. No pressure.