Start with the business problem

How to use this scorecard

1. Name the recurring task you want to improve and how much time it consumes.

2. Pick one relevant category. Do not compare unrelated tools as if they do the same job.

3. Use the Excel workbook to rate tools against seven criteria and adjust the weights.

4. Check official pricing, plan limits, privacy requirements and integration fit.

5. Run a small pilot and compare the outcome with your baseline.

Important: Vendor pricing is time-sensitive. Blank or unverified prices in the workbook must be checked directly with the provider before purchase. Ratings are intentionally left blank until you evaluate each tool.

AI tool comparison

25 tools • seven categories • selection starts with the job to be done

Customer Support

Tool	Primary job	Best fit
Intercom Fin	AI customer support	Support-heavy teams
Zendesk AI	Support operations	Support teams
Freshdesk	Ticket management	Service businesses

Finance & Bookkeeping

Tool	Primary job	Best fit
QuickBooks	Bookkeeping	SMB finance
Xero	Cloud accounting	Small finance teams
Zoho Books	Accounting workflows	Small businesses

Marketing & Design

Tool	Primary job	Best fit
Canva	Visual design	Small teams
Mailchimp	Email campaigns	Newsletter and retail
Buffer	Social publishing	Creators and agencies
Adobe Express	Branded social creatives	Design-light teams

Meetings & Productivity

Tool	Primary job	Best fit
Fireflies.ai	Meeting notes	Sales and service teams
Otter.ai	Meeting transcription	Meeting-heavy teams
Fathom	Meeting summaries	Consultants and sales
Notion AI	Knowledge and task management	Project teams

Sales & CRM

Tool	Primary job	Best fit
HubSpot	Lead and customer management	Growing sales teams
Pipedrive	Sales pipeline	Sales-led SMB
Zoho CRM	CRM and sales process	Budget-conscious SMB

Workflow Automation

Tool	Primary job	Best fit
Zapier	Connect apps and automate	Nontechnical SMB
Make	Visual process automation	Operations teams
n8n	Flexible automation	Technical SMB and agencies
Microsoft Power Automate	Microsoft process automation	Microsoft 365 teams

Writing & Content

Tool	Primary job	Best fit
ChatGPT	Draft, research and analyze	General SMB
Claude	Long-form writing and analysis	Consultants and teams
Gemini	Writing and workspace assistance	Google Workspace users
Jasper	Marketing copy workflows	Content teams

How the weighted score works

Rate each criterion 1–5. Adjust the weights in Excel for your own business.

Criterion	Default weight	What to check
Ease of use	15%	How quickly your team can work independently
Affordability	20%	Actual price at your expected usage and seats
Features	20%	Fit for the job you need completed
Automation	15%	Ability to remove repetitive work
Integrations	10%	Works with your existing systems
Scalability	10%	Works as your team or volume grows
Support & reliability	10%	Help, uptime, documentation and vendor maturity

Weighted score = SUM(each 1–5 rating × its weight) ÷ 5 × 100. A score of 80–100 is a strong fit, 60–79 is worth evaluating, and below 60 is a lower fit against your selected criteria. These are not universal product rankings.

Recommendations by category

These are shortlist starting points, not performance rankings.

Writing & Content

Start with ChatGPT, Claude or Gemini for broad writing and analysis; consider Jasper for a specialized marketing-copy workflow.

Marketing & Design

Canva and Adobe Express suit visual content; Mailchimp suits email marketing; Buffer suits social scheduling.

Sales & CRM

Compare HubSpot, Pipedrive and Zoho CRM around your pipeline and existing tools.

Customer Support

Compare Intercom Fin, Zendesk AI and Freshdesk based on ticket volume, knowledge base and escalation.

Workflow Automation

Compare Zapier, Make, n8n and Power Automate based on app connections, control and team skills.

Meetings & Productivity

Compare Fireflies.ai, Otter.ai and Fathom for notes; Notion AI for team knowledge workflows.

Finance & Bookkeeping

Compare QuickBooks, Xero and Zoho Books for your region, accountant and compliance needs.

Printable evaluation worksheet

Use one copy for each tool.

Business task: _____

Tool and plan: _____

Official pricing source and date: _____

Required integrations: _____

Data sensitivity / approval requirements: _____

Criterion	Rating (1–5)	Evidence / notes
Ease of use	_____	_____
Affordability	_____	_____
Features	_____	_____
Automation	_____	_____
Integrations	_____	_____
Scalability	_____	_____
Support	_____	_____

Decision: KEEP TESTING / PILOT / REJECT Owner: _____

ROI: a worked example

Marketing agency • illustrative assumptions, not a forecast.

Task time: 15 hours/week | Labor value: $30/hour | Expected time saved: 30%.

Estimated monthly hours saved = 15 × 52 ÷ 12 × 30% = 19.5 hours.

Gross monthly labor value saved = 19.5 × $30 = $585.

Monthly subscription = $60; monthly maintenance = $30; one-time setup = $250.

Monthly net benefit = $585 − $90 = $495.

First-year net benefit = $495 × 12 − $250 = $5,690.

First-year ROI = $5,690 ÷ ($90 × 12 + $250) ≈ 428%.

Payback on setup = $250 ÷ $495 ≈ 0.5 months, if estimated benefits materialize.

Labor value saved is not automatically cash saved. It may instead represent capacity for other work. Test your time-savings assumptions and include training, supervision, taxes and usage charges where relevant.

30-day AI adoption checklist

A controlled pilot beats a stack of unused subscriptions.

WEEK 1 — BASELINE

☐ Identify the task and owner

☐ Measure current hours and errors

☐ Check privacy and approval requirements

WEEK 2 — PILOT

☐ Compare 3 tools in one category

☐ Confirm real costs and limitations

☐ Run a limited test

WEEK 3 — INTEGRATE

☐ Connect existing workflow

☐ Train users and document steps

☐ Add human review and escalation

WEEK 4 — DECIDE

☐ Measure actual outcomes

☐ Calculate estimated ROI

☐ Keep, improve, consolidate or cancel

Final selection checklist

Make the buying decision only after answering these questions.

☐ Does it solve a recurring business problem?

☐ Does it fit our actual budget, usage and team size?

☐ Have we checked the official price and plan limits?

☐ Can our team use it without constant support?

☐ Does it integrate with the systems we already use?

☐ Have we checked customer data, access and privacy risks?

☐ Have we tested output quality with real, safe sample tasks?

☐ Do we know who owns it and how success will be measured?

☐ Do we have a review date before renewal?

Stop collecting AI tools. Start solving business problems.

Find the task costing you the most time, choose the right tool, and measure the results.

Created by Kishor Nair | AI Automation | Digital Marketing