

Checklist for _____ AI Excel Tool

(name of the tool)

No	Key Areas to Evaluate	✓
01	Strategic Fit <ul style="list-style-type: none"> ▶ Does this tool solve a real pain point in our data workflows or reporting process? ▶ Will it support our business goals (e.g., scaling, faster decisions)? 	
02	Team Adoption <ul style="list-style-type: none"> ▶ Can our team adopt this tool quickly without heavy training or resistance? ▶ Is it intuitive enough for all team members to use? 	
03	Integration & Workflow <ul style="list-style-type: none"> ▶ Will this tool integrate well with our current Excel-based workflows or systems? ▶ Can it streamline our processes without adding complexity? 	
04	Capabilities & Flexibility <ul style="list-style-type: none"> ▶ Does the tool offer the AI-powered features we actually need (e.g., forecasting, dashboards, automation)? ▶ Is it flexible enough to adapt with our changing data needs? 	
05	Pricing & ROI <ul style="list-style-type: none"> ▶ Is the pricing justifiable based on the expected ROI and efficiency gains? ▶ Does it fit our long-term budget? 	
06	Reliability & Trust <ul style="list-style-type: none"> ▶ Does the tool provider offer responsive support, updates, and documentation when we need it? ▶ Is the tool provider reputable and trustworthy? 	