How to Choose the Right AI Tool (Step by Step)

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A fully illustrated 28-step guide to choosing the right AI tool: define the real task, shortlist by capability, test candidates on one fair benchmark, then pilot and review.

Phase 1 — Define the Job Before the Tool

1. **Describe the job in one sentence**
   Describe the job in one sentence.
2. **List the concrete deliverables**
   List the concrete deliverables.
3. **Identify your input types**
   Identify your input types.
4. **Estimate how often you will use it**
   Estimate how often you will use it.
5. **Set a firm monthly budget**
   Set a firm monthly budget.
6. **List your data and privacy requirements**
   List your data and privacy requirements.
7. **Name the tools it must connect to**
   Name the tools it must connect to.

Phase 2 — Build a Shortlist

8. **Find candidates by task category**
   Find candidates by task category.
9. **Read the official capability limits**
   Read the official capability limits.
10. **Check the release notes**
    Check the release notes.
11. **Drop anything that fails a hard constraint**
    Drop anything that fails a hard constraint.
12. **Read the data retention policy**
    Read the data retention policy.
13. **Check rate and usage limits**
    Check rate and usage limits.
14. **Confirm you can export your work**
    Confirm you can export your work.

Phase 3 — Test Tools on the Same Task

15. **Write one realistic prompt**

    Write one realistic prompt.

16. **Freeze one set of input material**

    Freeze one set of input material.

17. **Define a simple scoring rubric**

    Define a simple scoring rubric.

18. **Record how long each run takes**

    Record how long each run takes.

19. **Run each test three times**

    Run each test three times.

20. **Log where each tool fails**

    Log where each tool fails.

21. **Try one long or awkward input**

    Try one long or awkward input.

Phase 4 — Decide, Pilot and Revisit

22. **Use the leading tool on real work**

    Use the leading tool on real work.

23. **Measure time saved honestly**

    Measure time saved honestly.

24. **Ask a colleague to try it**

    Ask a colleague to try it.

25. **Check the output needs only light editing**

    Check the output needs only light editing.

26. **Calculate the true monthly cost**

    Calculate the true monthly cost.

27. **Keep a fallback for critical work**

    Keep a fallback for critical work.

28. **Set a thirty-to-sixty-day review**

    Set a thirty-to-sixty-day review.

Sources

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   https://www.anthropic.com/
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   https://www.nist.gov/
3. Mozilla — web and browser resources
   https://www.mozilla.org/
4. Microsoft Learn
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Written as a checklist from https://www.howcompass.com/how-to/How-to-Choose-an-AI-Tool. Corrections: https://www.howcompass.com/correc