



Evaluating AI for CX

A buyer's guide
for B2B Support
and Success leaders

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Evaluate for partnership, not just product fit



The AI buying landscape is evolving faster than most teams can keep up.

Smart B2B CX leaders are making strategic AI investments every quarter, but they're doing it in a market where best practices are still being written.

Even experienced technology buyers find themselves navigating new variables: rapidly evolving capabilities, shifting vendor landscapes, and use cases that didn't exist a year ago.

This marks the beginning of what we call the experience-led era—a shift where the strongest differentiator for SaaS companies is no longer just product features or pricing, but the quality of the customer experience. In this new era, the value of technology is defined not by how many capabilities it offers, but by how seamlessly customers can realize outcomes, build confidence, and stay loyal through every interaction.

In this new experience-led era, success hinges not just on what a platform can do—but how quickly teams can learn, adapt, and drive value from it.

The most successful AI buyers are those who know how to cut through vendor messaging, assess real-world fit, and build business cases that account for both immediate ROI and long-term strategic value. That requires a systemic strategy to evaluate vendors quickly and accurately.

This guide gives you that systematic approach. You'll gain a proven framework to evaluate AI platforms efficiently, align stakeholders around realistic outcomes, and make informed buying decisions, even as the technology landscape continues to evolve.

→ **Six steps for evaluating the right
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Six steps for evaluating the right AI platform for B2B CX teams

The key to successful AI implementation isn't just adopting the latest tools—it's choosing platforms that drive real impact across the customer journey. That means improving the experience for both your customers and the teams supporting them.

In practice, the most valuable AI investments often work behind the scenes: making agents faster, onboarding easier, and service more consistent at scale.

This guide outlines six practical steps to help you identify high-impact platforms, evaluate their fit, and confidently invest in solutions that deliver measurable ROI—today and over time.



01

Run an AI readiness diagnostic

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Run an AI readiness diagnostic

Most AI implementations don't fail because of technology limitations. They fail because foundational elements weren't in place.

Before evaluating any AI platform, you need an honest assessment of where your organization stands today. There are three critical areas to consider:

- **Knowledge hygiene**
- **System sprawl**
- **Team mindset**

Knowledge hygiene

Knowledge hygiene is the foundation of any successful AI implementation.

AI systems are only as good as the data they're trained on—the classic "garbage in, garbage out" principle applies directly here. Poor knowledge hygiene can actively harm your customer and buyer experience by amplifying inconsistencies and outdated information at scale. To assess your knowledge hygiene, ask yourself:

- ☐ **How many different systems do your customer-facing teams use to find information?**
- ☐ **What's your knowledge management process look like?**
- ☐ **How outdated are your core sources of knowledge?**
- ☐ **Do you have a process for maintaining content accuracy across teams?**
- ☐ **Are there clear owners for different types of content?**

You don't need to have the perfect knowledge base to implement and see value from AI—that's impossible. But you do need to have a clear understanding of your current state, including which tools to connect to your AI, how you'll ensure your AI isn't reliant on outdated info, and how you'll create feedback mechanisms to consistently improve your knowledge.

What's key is having a platform that understands the mess.. That's where pre-processing comes in. The right platform will do more than just plug into your systems. It will prepare your knowledge—indexing, enriching, and structuring it so information is easy to search, retrieve, and use in context.

As you evaluate AI solutions, look closely at how they handle this step. Do they pre-process your data in a way that makes knowledge usable from day one? This is one of the biggest hidden variables in AI performance—and one of the most overlooked during vendor selection.

Most knowledge management tools get one thing wrong: they rely on assigning articles to team members for regular updates. That doesn't work—people end up owning too many articles, it becomes a full-time job, and there's no guarantee anyone reads them.

Instead, make your knowledge work for you. Connect all your data to an AI platform so anyone can search it anytime.

If answers are missing or outdated, users can quickly check with experts and log validated, timestamped responses in the system.

This way, you only spend time updating what's actually needed—no wasted effort on unused docs.

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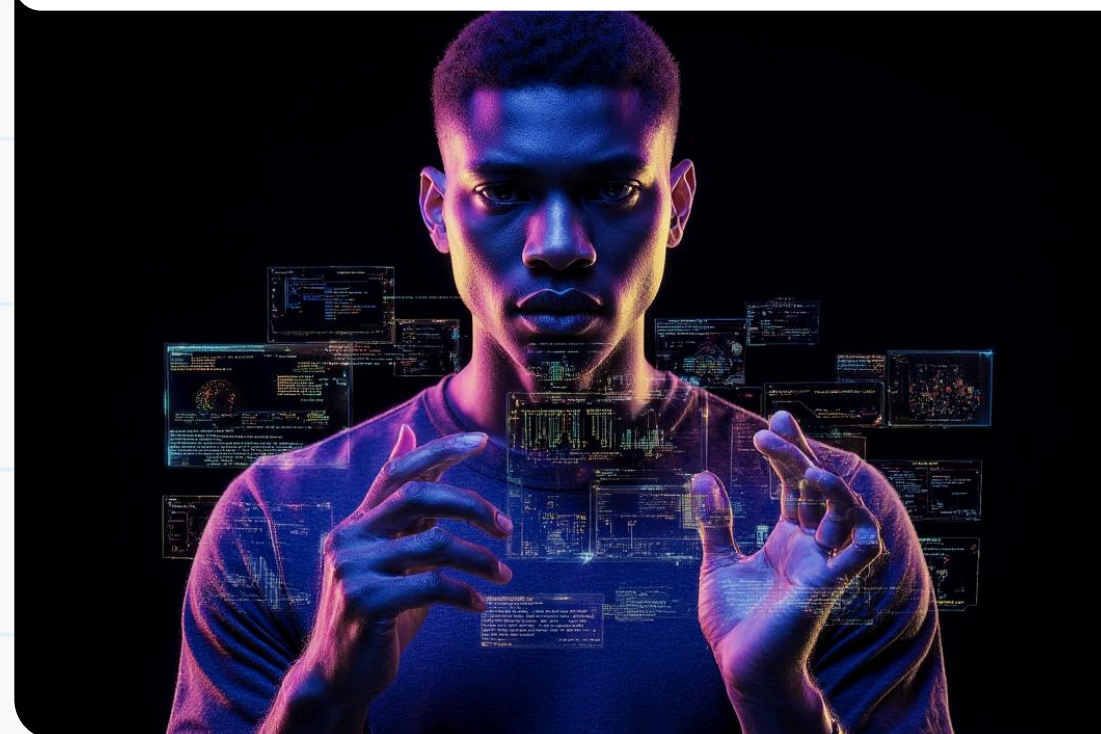
System sprawl

In most CX teams, it's pretty common to jump between 10+ tools daily. AI platforms can excel at reducing the cognitive load of switching between tools like this.

The challenge is that if your AI platform only connects to a subset of these systems, it will provide incomplete answers, forcing agents back into their old, fragmented, manual workflows.

So ask yourself:

- ❑ **How many applications does the average team member use daily?**
- ❑ **Do your core systems integrate with each other?**
- ❑ **How often do team members need to search for information outside their primary workflow tools?**
- ❑ **What percentage of questions require escalation due to issues with accessing information?**



Team mindset

AI success starts with trust—and that begins with your people. The most effective teams see AI not as a replacement, but as a partner: a tool that amplifies their expertise and clears the path for higher-value work.

In contrast, when teams feel disconnected from the “why” behind AI, adoption stalls. That’s why mindset is as critical as any technical decision. Before rolling out a platform, it’s important to gauge how ready your teams are to embrace AI as a strategic advantage.

Consider:

- ❑ **How do teams currently handle knowledge sharing and collaboration?**
- ❑ **What's the general sentiment toward automation and AI assistance?**
- ❑ **Do you have change champions who can drive AI adoption?**
- ❑ **How comfortable are your teams with learning new technologies?**



If your teams aren't fully there yet, that's not a blocker—it's an opportunity. A couple of sessions focused on can shift the narrative, create buy-in, and dramatically increase the odds of long-term success. When people understand how AI makes their work better, they'll lead the transformation from within.



02

**Define
your use case**

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Define your use case

The most successful AI implementations start with specific, measurable pain points. Broad goals like “make team members more efficient” or broad approaches don’t work. People may use your AI, but you’re guaranteed to have a hard time understanding if it’s actually bringing positive ROI.

Bottom line: the more specific you are with your goals up front, the easier it’ll be to see success.

So what’s costing your team time, money, or customer satisfaction today?

AI excels at knowledge-intensive tasks, pattern recognition, and workflow automation, so identifying those issues across your team is a good place to start. Here’s the playbook we’ve seen work time and time again:

- **Start with one team.** Choose your pilot team based on where you can demonstrate clear, measurable value quickly. Support teams often make ideal starting points because their workflows are well-defined and metrics are readily available. To be clear, “team” doesn’t necessarily mean having 100 support agents pilot AI—your initial team may just be a handful of agents for a few weeks, then a slightly bigger group, then eventually the entire team.
- **Identify problems that create downstream issues.** The best AI use cases solve problems that currently cause multiple secondary problems. Slow response times indicate inefficiency, but they also increase escalations, reduce CSAT, and create frustrated agents and customers. Solving one core issue with AI can improve multiple metrics simultaneously.

□ **Build a repeatable model.** Once you’ve seen success with one team, it’s easier to scale to others. [Rapid7 experienced this](#) with Ask-AI. They implemented an “Ask AI first” policy in their Support team, which resulted in 30% faster ticket handling and a 35% increase in agent capacity. That made it far easier to expand AI usage out to their Customer Success and Sales Engineering teams.

How effective AI is depends heavily on your specific data, workflows, and use cases. At Ask-AI, we start with a discovery and diagnostic process that includes:

- **Workflow shadowing sessions** with frontline teams to document current processes and identify inefficiencies that AI could address.
- **Data analysis** of support tickets, Slack conversations, and knowledge base usage patterns.

The findings from this diagnostic process helps us provide customized recommendations that translate to solving real problems with high ROI potential, rather than implementing technology for its own sake. Any provider you work with should offer something similar so you can see value up front.

A photograph of two women in a dark environment. The woman on the left is looking towards the camera with a slight smile, her face illuminated by a soft blue light. The woman on the right is smiling broadly, her face lit with a warm purple light. Both are wearing dark-colored tops.

03 Align on outcomes

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Align on outcomes

Different stakeholders often have different definitions of "success." Your executive team might focus on cost reduction, while frontline support managers prioritize agent satisfaction, and customers care most about response quality and resolution times.

Aligning on specific, measurable outcomes upfront ensures everyone evaluates AI platforms against the same criteria.

Without clear, measurable goals, even successful AI implementations can seem ineffective. Aligning on outcomes up front also avoids moving the goalposts after implementation.

You can target metrics like:

- ❑ **A reduction in average handle time or faster resolution times.**
- ❑ **An increase in CSAT or NPS scores.**
- ❑ **Lower support costs (e.g. decrease in % of ARR spent on support or reduced cost per ticket).**
- ❑ **Faster new hire ramp time.**

If you're starting with customer success or support from sales your metrics will look a little different, but the point is to pick something that's clear and measurable.

Their results included:

- ❑ **Improved response consistency across global teams.**
- ❑ **Reduced customer dependence on manual intervention.**
- ❑ **Enhanced professionalism in customer interactions.**
- ❑ **Better knowledge sharing between internal teams.**

Once you've defined success criteria, our biggest tip for goal-setting is to set a baseline for your metrics:

- ❑ **They provide the foundation for ROI calculations.**
- ❑ **They help you identify which AI platforms can actually deliver measurable improvements.**
- ❑ **And they'll make it easier to set realistic expectations and timelines for different types of improvements.**

For example, a 10% jump in CSAT in three months might be impossible to achieve based on your historical data. But it might be possible to reach it in six or twelve months. Setting the baseline measurement and knowing how much deviation you've had over time will make it much easier to differentiate between whether the platform is a bad fit or whether your expectations are unrealistic.

HiBob identified a range of goals when they implemented Ask-AI. Their VP of Global GTM Revenue Operations, **Orly Gerassi Ganor** said:



The ROI of AI for CX wasn't just on ticket deflection or time to resolution—it was also about CSAT and professionalism."



04

Compare platform capabilities

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Compare platform capabilities

Comparing platforms apples-to-apples can be hard because many providers use very similar terminology to describe vastly different features. Set up a scorecard for yourself with the features that are most important for your use case and use it to assess AI platforms systematically.

These are the different areas to evaluate:

AI sophistication and accuracy

The underlying AI architecture significantly impacts long-term success, particularly when dealing with nuanced scenarios that require context or customer history. Platforms using retrieval-augmented generation (RAG) can often provide more accurate and up-to-date responses because they reference your current knowledge base in real-time, rather than relying solely on static, pre-trained models. This makes them especially useful for CX teams that are interacting with customers and need to tailor their responses based on recent customer history.

Ask your prospective AI platforms questions like these:

- ☐ Does the platform use RAG for better accuracy?
- ☐ Can the AI be customized with your specific domain knowledge?
- ☐ How does the platform handle context and follow-up questions?
- ☐ What's the accuracy rate for responses in your domain?
- ☐ How does the AI improve over time with usage?
- ☐ Can you provide feedback to refine responses?
- ☐ How does the platform learn from your specific content and workflows?

UX and adoption

Usage and adoption doesn't necessarily guarantee value from your AI platform, but if usage and adoption are zero, you know for sure that your investment was a waste. That means you can't underestimate the importance of an intuitive interface and user-friendly platform.

As you're evaluating vendors, ask yourself (or your vendor) questions like these:

- ☐ How intuitive is the platform for non-technical users? How does it differ for different teams?
- ☐ Can the AI be integrated into your existing workflows (e.g., Slack, web browser, support tools)?
- ☐ Can your team access it without leaving their primary tools?
- ☐ Does the interface reduce clicks and context-switching?
- ☐ How seamless is the handoff between AI and human agents (where applicable)?

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Analytics and measurement

The most valuable systems offer insights that help you understand not just what's happening, but also why and how to improve it.

One valuable feature is being able to connect your AI platform's data to your business data. Correlating AI usage with customer satisfaction, resolution times, and other KPIs help you optimize for results rather than just usage. Ask questions like:

- ☐ Can you see adoption rates by team, individual, and use case?
- ☐ Does the platform track time saved and efficiency gains?
- ☐ Are there built-in dashboards for managers and executives?
- ☐ Can you correlate AI usage with customer satisfaction scores?
- ☐ Does the platform track resolution times and quality metrics?
- ☐ Are there ROI calculators and reporting tools?

Integration

Poor integration and lack of connectors forces teams to context-switch between AI and their existing tools, leaving your AI implementation dead on arrival. The best AI platforms become invisible layers that improve existing workflows, rather than forcing your team members to make big changes.

Key integration questions to evaluate:

- ☐ Does the platform integrate with your existing support, CRM, and knowledge management tools?
- ☐ Can it pull information from multiple data sources simultaneously?
- ☐ Are there API limitations that could impact functionality?
- ☐ Can agents access AI assistance without leaving their primary tools?
- ☐ Does it require custom development work or middleware for setup?
- ☐ What happens when integrated systems update their APIs? Is ongoing maintenance required?
- ☐ How long does it take to get integrations up and running —and see results?

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Security & governance

AI platforms handle some of your most sensitive data—customer information, internal knowledge, and proprietary processes. The challenge with AI security goes beyond traditional software concerns, as AI systems learn from your data and can potentially expose information in unexpected ways.

Strong governance ensures AI enhances your operations without compromising data integrity or creating compliance risks.

Key security and governance questions to consider during your buying process include:

- ☐ What security certifications does the platform maintain (SOC 2, ISO 27001, GDPR compliance)?
- ☐ Are there granular admin controls for content access and user permissions?
- ☐ How is data encrypted both in transit and at rest, and where is it stored geographically?
- ☐ Can you control what data the AI system learns from or excludes from training?
- ☐ What safeguards exist to prevent AI hallucinations or inappropriate information sharing?
- ☐ What audit logs are available for tracking user activity and AI interactions?
- ☐ How does the platform handle single sign-on (SSO) integration and role-based access controls?

Time to value

Time to value obviously impacts ROI calculations and your team's confidence in AI. A platform that can deliver quick wins builds momentum for broader adoption and larger investments. Don't be afraid to ask vendors questions like these:

- ☐ What's the typical timeline from contract to full deployment?
- ☐ What level of internal resource commitment is required?
- ☐ Can you start with a pilot before full rollout?
- ☐ What training and change management support is provided?
- ☐ How can the platform grow with your organization?



05

**Pressure test
with real scenarios**

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Pressure test with real scenarios

Demo environments with perfect data and ideal use cases often fail to reflect real-world performance.

The great news is that a well-structured pilot will also help build internal confidence and identify champions who can drive broader adoption of your new AI platform.

You can get the most value out of testing by:

- **Using your real data.** Testing with your actual content will show you how well the AI handles your terminology, writing styles, or any potential information gaps. Many businesses will say things like "our product is just too complex for AI" or "our industry has too much specialized knowledge." The only way to know for certain is to test with your actual knowledge base, support tickets, and customer questions. That might highlight a documentation gap more than a capabilities gap.

- **Involve your frontline teams in the evaluation.** Team members who will use the AI daily provide the most valuable feedback about usability and its practical impact. They'll quickly identify whether the AI saves time or adds another step to their workflow. Plus, teams that participate in selecting their AI tools are likely to see higher adoption rates than those who have solutions imposed on them.

- **Test failure scenarios, not just success stories.** Ask the AI questions you know don't have clear answers in your knowledge base. See how it handles conflicting information, outdated content, or requests outside its scope. The best AI platforms acknowledge limitations and guide users to human experts when needed, rather than confidently providing incorrect information.

Let's be clear: Thorough testing is paramount. **Trust is the most valuable currency in AI adoption**—and the hardest to rebuild once lost. Taking an extra 1-2 weeks to ensure the launch is successful will always outperform a rushed deployment that damages team or customer confidence in AI.



06

**Build a strong
business case**

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Build a strong business case

The final step is to build a strong business case. Anchor your proposal in business value that leadership already cares about—cost reduction, capacity improvement, and customer experience enhancements.

The most compelling business cases demonstrate value across multiple impact areas rather than relying on a single metric that might be deprioritized.

There are often three core dimensions that we see companies use to calculate the ROI of AI:

- How much **capacity** can this platform unlock? Examples might be time saved per agent per day, AI ticket resolution rates and how they translate to cost savings, or quantified faster response times.
- What's the impact of the reduced **ramp time**? For example, what's your current new hire's time-to-productivity and by how much could it improve with an AI-assisted onboarding? Calculate cost savings based on faster ramp times.
- How can it improve **quality** across the board? You can base this on CSAT or NPS scores, but it could also be IQS (Internal Quality Score) measuring response consistency. You could measure and calculate retention improvements based on a better customer experience.

Here's an example calculation based on a 50-person support team:

Time saved

2 hours per agent per day × \$30/hour × 50 agents
× 250 working days = \$750,000

Faster ramp

30% reduction in ramp time → equivalent to 3 additional FTEs → \$195,000 value

Quality improvement

5% CSAT increase → 2% churn reduction
→ \$200,000 revenue protection

Total annual value: \$1,145,000

Platform cost: \$150,000

ROI: 763%

Use data from your pilot or comparable customers (in terms of industry, company or size, the type of product) from your vendor to build an estimate like this for your business case.

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Evaluate for partnership, not just product fit

Evaluate for partnership, not just product fit

AI implementations can heavily impact your business, completely reshaping how your company operates.

That's why it's a good idea to evaluate the AI platform as a partner committed to your long-term success. Even if they have a truly impressive product, AI advancements are progressing at an insanely fast rate. Working with a partner that has a similar long-term vision to yours will make a huge difference.

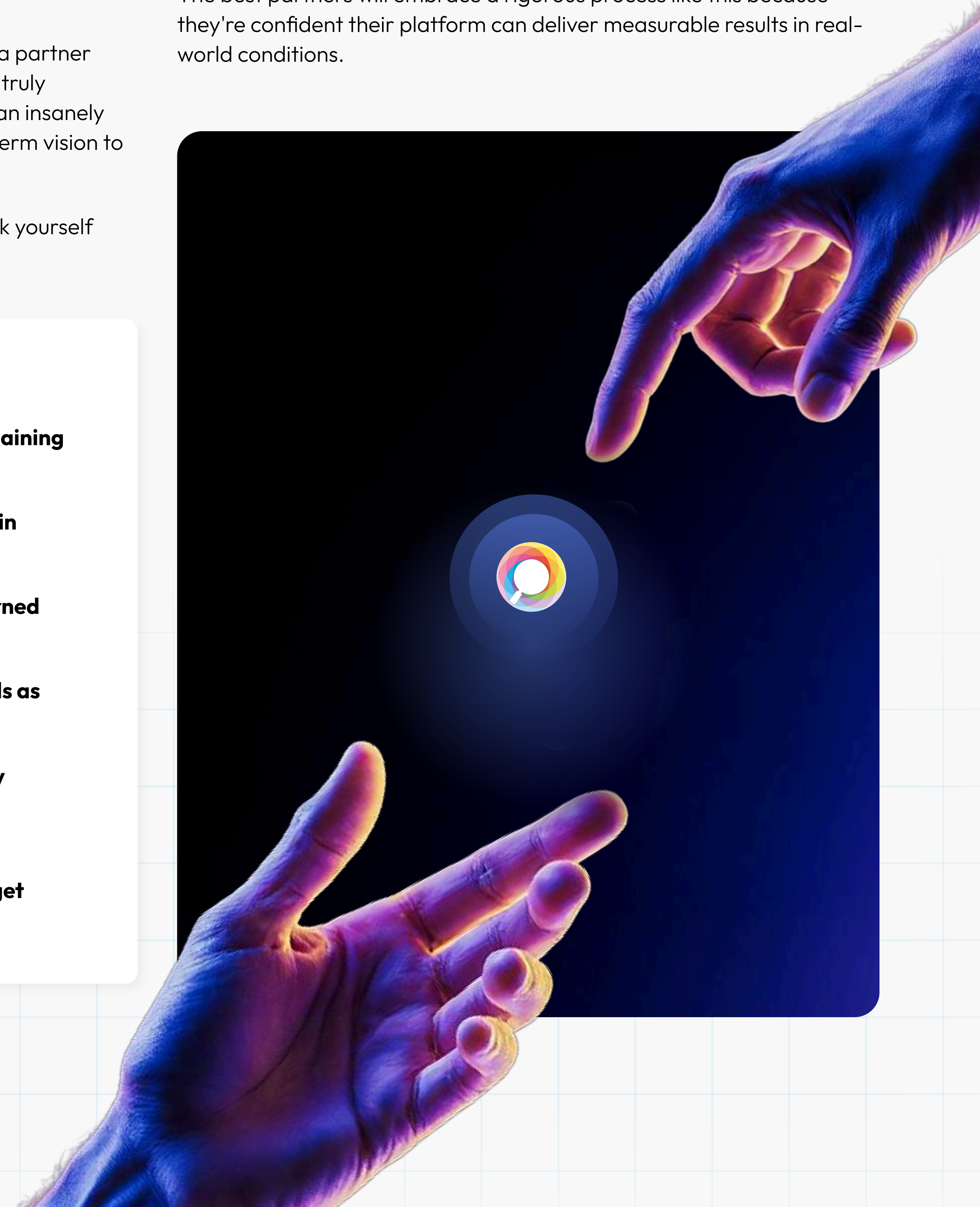
You'll see hints of this throughout the sales process, but ask yourself questions like these before signing a contract:

- ☐ **Do they really understand your pain points?**
- ☐ **Can they provide strategic help beyond just explaining how their product works?**
- ☐ **Can they connect you with reference customers in similar situations?**
- ☐ **Are they open about challenges and lessons learned from previous implementations?**
- ☐ **Is their product roadmap aligned with your needs as a customer?**
- ☐ **What's their pace of development like? Can they evolve and differentiate themselves in such a competitive market?**
- ☐ **How quickly can they deploy an AI solution and get your support team up and running?**

The beauty of following a structured evaluation approach like the one outlined here is that it naturally surfaces these partnership indicators.

When you define specific use cases and run a pilot with real scenarios, you'll see how vendors respond to your actual challenges.

The best partners will embrace a rigorous process like this because they're confident their platform can deliver measurable results in real-world conditions.





Ready to turn AI potential into measurable results?

Ask-AI can help you identify your highest-impact use cases and build a data-driven business case.

Meet with an Ask-AI expert

