

AI Evaluation Checklist

How well is AI being leveraged in your current or potential billing and payment solutions?

As your team looks to adopt new tools or replace legacy systems, AI is sure to be thrown around as a buzzword. It makes sense: AI is having a major impact on billing and payments. But not all platforms are created equal.

Whether you're assessing your current systems or exploring new solutions, here are the key questions to ask to ensure you're unlocking real value, not just chasing hype.

Strategic Fit & Impact

- ☐ Which low-value, repetitive tasks does this platform help automate so my team can focus on high-impact work?
- ☐ Are these tasks currently eating up staff time?
- ☐ Is AI being used to rethink workflows or just layered onto legacy systems?

Customer Experience

- ☐ If AI agents are included for customer support functions, can they deliver empathetic, personalized service?
- ☐ Are AI agents designed to carry over important context to Customer Service Representatives for a smooth handoff?
- ☐ How does it support proactive service, like making recommendations based on customers' history or preferences?

Data Intelligence

- ☐ Is Gen AI being used to unify fragmented data from multiple systems (even legacy platforms)?
- ☐ Do reporting tools offer predictive insights, like identifying which customers are most likely to adopt AutoPay or go paperless?
- ☐ Can it generate reports and help visualize trends without technical expertise?

Security & Governance

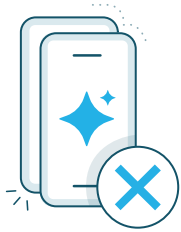
- ☐ Is the AI solution built with enterprise-grade security, monitoring, and traceability?
- ☐ Does it ensure compliance and control while simplifying workflows?

Scalability & Integration

- ☐ Is the platform purpose-built for billing and payments, or is it a generic AI tool?
- ☐ Can it integrate easily with our existing systems and scale as our needs evolve?
- ☐ Does it reduce IT burden or add complexity?



Your Results



0-5 AI is an Afterthought

The solution you're evaluating is not quite there with deploying AI effectively. It may just be stacking AI on top of an existing solution or there may be a lack of thought around security, scalability, and traceability. Wherever this solution is lacking, it's likely not the best choice for a billing organization looking to effectively and responsibly utilize AI.



6-10 Getting Warmer

The solution you're evaluating is beginning to incorporate AI into its platform, but it's not quite there yet. For the application of AI to be truly successful, it must be a wholesale approach. Bottom line: if all the boxes aren't being checked, the AI in question won't be the best possible option for your team.



11-14 You've Found a Solid Solution

If the solution you're evaluating has scored this high, you've found a platform that is approaching AI deployment in a holistic way. This solution is obviously using AI not as a bolt-on feature, but as a way of reimagining billing and payment workflows in their most efficient form. Congratulations, your team has found a solution that will be able to leverage AI to your advantage!

TALK TO A PAYMENTS EXPERT

