The AI Tool *Must-Have* Capabilities Checklist

See if the AI solution you are evaluating truly delivers on what matters most.

☐ **Transparency & Control**

   ☐ Provides a clear audit trail: See what happened, when, and why

   ☐ Built-in controls: Includes internal checks, human-in-the-loop options, and review checkpoints

   ☐ Honest about limitations: Shares hallucination rates and how errors are managed

☐ **Security & Compliance**

   ☐ SOC 2, ISO 27001, and IRS e-signature compliant

   ☐ Security-first design with regular audits and reporting

   ☐ Clear data usage policies and client data boundaries

☐ **Integration & Flexibility**

   ☐ Works with your existing tools and others in the market

   ☐ Adapts to your unique workflows and business processes

   ☐ Scales with your team—no hidden manual effort behind the scenes

☐ **ROI & Real Value**

   ☐ Delivers fast time to value with real-world firm success stories

   ☐ Offers hard ROI metrics—not vague promises

   ☐ Fully functional today—not reliant on "roadmap" features

☐ **Performance & Support**
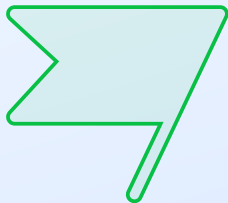
   ☐ Regularly monitored and updated to avoid model drift

   ☐ Includes live demos with data

   ☐ Backed by real users and community endorsements

Your AI Partner: What You *Need* To Know

When choosing an AI solution for your firm, it's crucial to see the full picture.
Here's what will help you make the right decision:

GREEN FLAGS
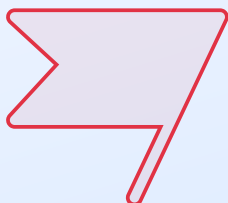### (Signs of reliable AI):

- **Clear Audit & Control:** You always know what's happening with your data and why.

- **Transparency About Limitations:** The provider openly discusses potential errors and how they are managed.

- **Compatibility & Scalability:** The solution easily integrates with your current tools and grows with your team.

- **Real Value:** There are confirmed success stories and concrete ROI metrics.

RED FLAGS
(Proceed cautiously):

- **Lack of Transparency:** Unclear processes or hidden "manual" operations.

- **Vague Promises:** Lots of talk about the "future," but little functionality today.

- **Integration Complexity:** Requires a complete overhaul of your current workflows.

- **Insufficient Support:** No clear mechanism for updates or live demos.

Ready to Maximize the Potential of AI for Your Firm?

Soraban transforming accounting with transparent, secure AI that scales.

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