

# AI Vendor Selection Matrix: A Framework for Evaluating AI Solutions

A structured evaluation methodology for mid-market businesses navigating the AI vendor landscape. Covers evaluation criteria, category analysis, and selection frameworks across major solution categories.

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# 1. Executive Summary

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The AI vendor landscape has expanded dramatically. Businesses evaluating AI solutions now face hundreds of options across dozens of categories, each with different pricing models, integration requirements, and capability claims. For mid-market companies without dedicated technology evaluation teams, this landscape is overwhelming.

This matrix provides a structured framework for evaluating AI vendors across ten major solution categories. Each category includes vendor profiles, capability assessments, pricing analysis, integration requirements, and selection recommendations based on company size, technical maturity, and use case requirements.

*This matrix is vendor-neutral. OB.1 AI Solutions does not resell vendor licenses or receive referral commissions. Our evaluation criteria prioritize operational fit, integration complexity, total cost of ownership, and realistic ROI timelines for mid-market businesses.*

|                                    |  |                                   |  |
|------------------------------------|--|-----------------------------------|--|
| <b>450+</b><br>Solutions evaluated | <b>10</b><br>Major solution categories | <b>8</b><br>Evaluation dimensions | <b>\$500K-<br/>10M</b><br>Target company revenue range |
|------------------------------------|--|-----------------------------------|--|

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## 2. How to Use This Matrix

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This document is designed to be used after an AI Readiness Assessment and operational diagnosis. It is not a substitute for understanding your own operations. If you haven't completed Phase 1 (AI Readiness Score) and Phase 2 (Clinical Discovery) of the Blueprint Methodology, start there. Vendor selection without operational clarity is the most common cause of AI project failure.

### **Recommended workflow:**

**Step 1:** Complete the AI Readiness Assessment at [app.auditynow.com](https://app.auditynow.com) to establish your baseline operational maturity score.

**Step 2:** Identify your top 2 to 3 operational pain points from the discovery phase. These define which solution categories are relevant.

**Step 3:** Navigate to the relevant category sections in this matrix. Review the evaluation criteria, vendor profiles, and selection recommendations.

**Step 4:** Use the Evaluation Scorecard Template (Appendix B) to score your shortlisted vendors against your specific requirements.

**Step 5:** Apply the Vendor Selection Decision Framework (Section 15) to make a final selection based on fit, cost, and implementation complexity.

### 3. Evaluation Criteria: The 8-Dimension Scoring Framework

Every vendor in this matrix is evaluated against eight dimensions. Each dimension is scored 1 to 10. The weighting of dimensions varies by company profile, which is why we provide raw scores rather than weighted totals.

| Dimension               | What It Measures   | Why It Matters                           |
|-------------------------|--|--|
| Core Capability         | How well the tool performs its primary function                    | Basic competence threshold               |
| Integration Ease        | API quality, native connectors, middleware support                 | Reduces 2-5x integration cost multiplier |
| Mid-Market Fit          | Pricing, complexity, support appropriate for \$50K-10M enterprises | Eliminates enterprise-only solutions     |
| Data Requirements       | Volume, quality, and format of data needed                         | Matches your current data maturity       |
| Time to Value           | Days from purchase to measurable ROI                               | Cash-sensitive mid-market constraint     |
| Scalability Path        | Growth capacity without platform migration                         | Prevents painful re-platforming          |
| Vendor Stability        | Funding, revenue trajectory, customer base health                  | Risk of vendor failure or acquisition    |
| Total Cost of Ownership | All-in cost over 24 months including hidden costs                  | True financial impact assessment         |

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## 4. Category 1: Document Processing and Extraction

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Document processing AI converts unstructured documents (invoices, contracts, forms, emails) into structured, actionable data. For mid-market companies still manually processing documents, this category typically delivers the fastest ROI.

### Category Overview

This category includes optical character recognition (OCR), intelligent document processing (IDP), contract analysis, and invoice automation tools. The market has matured significantly, with most solutions now offering pre-trained models that work out of the box for common document types.

### Selection Guidance for Mid-Market

If you process fewer than 500 documents per month, start with a lightweight solution that offers per-document pricing rather than an enterprise platform license. If you process 500 to 5,000 documents per month, evaluate mid-tier platforms that balance accuracy with cost. Above 5,000 documents, enterprise platforms become cost-effective, but integration complexity increases.

*Key finding: For mid-market companies processing fewer than 1,000 documents monthly, the top-performing solutions cost 60-80% less than enterprise platforms while delivering comparable accuracy on standard document types.*

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# 15. Vendor Selection Decision Framework

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After scoring vendors against the 8-dimension framework, apply these decision rules to make a final selection.

## Decision Rule 1: Eliminate Before Comparing

Remove any vendor scoring below 5 on Integration Ease or Mid-Market Fit. These are non-negotiable thresholds. A brilliant tool that can't integrate with your systems or wasn't built for your company size will create more problems than it solves.

## Decision Rule 2: Weight by Your Weaknesses

If your AI Readiness Score is below 30, weight Time to Value and Integration Ease highest. You need quick wins that build organizational confidence. If your score is above 30, you can weight Core Capability and Scalability higher because your foundation supports a more ambitious implementation.

## Decision Rule 3: Calculate 24-Month TCO, Not Annual License

Include: license fees, integration costs (typically 2-5x the license), training time (valued at your team's hourly rate), ongoing maintenance, and the productivity dip during the first 60 days. The cheapest license often isn't the cheapest total investment.

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# About OB.1 AI Solutions

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OB.1 AI Solutions provides vendor-neutral AI strategy consulting for small and mid-market businesses. Our AI Vendor Selection Matrix is updated quarterly and informed by direct evaluation, client implementation experience, and market analysis. We do not accept vendor sponsorship, referral fees, or affiliate commissions for our recommendations.

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