AI strategy and business-case worksheet

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Work through the prompts with the people who own the process. Record evidence and open questions, then agree who will act and by when.

01 · Frame the opportunity

Start from a business objective and the current work, including the option to keep the manual process.

Objective and value stream

Name the business objective, sponsor, workflow, affected people and current AI tools or experiments.

Baseline and expected benefit

Record today's time, review effort, quality and costs. Describe the expected benefit and how it would be measured.

Opportunity comparison

Compare candidate uses by expected value and feasibility. Higher feasibility means simpler integration, usable data and available capacity.

Risk and permission

Record intended actions, authority limits and the authorising owner, separately from expected value. Include privacy, security, legal and human-review checks; a high score grants no permission.

02 · Test the business case

Use ranges and evidence. Treat benefit estimates as assumptions until a pilot tests them.

Data readiness

Name valuable data, owners, quality gaps, access restrictions and integration requirements. Assign preparation actions.

Buy, build or partner

Compare business fit, compatibility, total cost, supplier evidence, support and exit arrangements, including a manual alternative.

Costs and benefits

Record setup, integration, subscriptions, staff time, review, maintenance and exit costs. State benefit assumptions, uncertainty and evidence needed.

Resources and collaboration

Name responsible technical specialists for tool/data permissions, integrations and implementation validation. Identify internal capacity and external training or research support; verify partners and funding assumptions.

03 · Own the next 90 days

The roadmap is a planning output. Agree engagement timing and fees separately.

Priorities and decisions

For each use, record pilot, defer or decline, with the rationale, assumptions and approval conditions.

Owners and milestones

Assign a sponsor, delivery owner, resources and milestones for the next 90 days. Record dependencies and due dates.

Pilot and acceptance

Define baseline, test examples, human reviewer, acceptance criteria and conditions for stopping. Link the pilot worksheet.

Review and portfolio

Set a review date and link the use-case register. Decide what evidence could justify continuing, changing, scaling or retiring the use.

Background reading: https://adastudio.ch/blog/from-ai-pilot-to-practice