



AI Opportunity Assessment Worksheet

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AI Opportunity Assessment Worksheet

A Practical Framework for Identifying High-Value AI Projects

THE 3 R's OF AI ROI

Every AI opportunity in your business fits into at least one of these three categories:

1. ■ **REDUCE:** What Repetitive Tasks Drain Your Team's Time?
2. ■ **REVEAL:** What Insights Are Buried in Your Data?
3. ■ **RESPOND:** What Decisions Need to Happen Faster?

STEP 1: IDENTIFY OPPORTUNITIES (15 minutes)

For each category below, list 2-3 specific opportunities in your business:

■ REDUCE - Repetitive Task Automation

What tasks do your team members complain about regularly?

Administrative Tasks:

- ■ Data entry from forms/emails → [Your Example: _____]
- ■ Report generation → [Your Example: _____]
- ■ Meeting notes/summaries → [Your Example: _____]
- ■ Other: _____

Customer-Facing Tasks:

- ■ Answering common questions → [Your Example: _____]
- ■ Initial inquiry triage → [Your Example: _____]
- ■ Appointment scheduling → [Your Example: _____]
- ■ Other: _____

Typical ROI: 20-40 hours saved per employee per month

■ REVEAL - Insights Hidden in Data

What questions could your data answer that would change decisions?

Sales & Marketing:

- ■ Which leads are most likely to convert? → [Your Data: _____]
- ■ What's the true customer lifetime value? → [Your Data: _____]

- Which channels actually drive revenue? → [Your Data: _____]
- Other: _____

Operations:

- Where are the bottlenecks costing money? → [Your Data: _____]
- Which suppliers are becoming unreliable? → [Your Data: _____]
- What's the optimal inventory level? → [Your Data: _____]
- Other: _____

Finance:

- Which customers are payment risks? → [Your Data: _____]
- Where does profit actually come from? → [Your Data: _____]
- What's the true cash flow forecast? → [Your Data: _____]
- Other: _____

Typical ROI: 15-30% improvement in decision quality

■ RESPOND - Faster Decision Making

What decisions are currently too slow or inconsistent?

Pricing:

- Real-time competitive pricing → [Your Example: _____]
- Dynamic discounting based on inventory → [Your Example: _____]
- Customer-specific pricing → [Your Example: _____]
- Other: _____

Resource Allocation:

- Service technician routing → [Your Example: _____]
- Staff scheduling optimization → [Your Example: _____]
- Inventory reordering triggers → [Your Example: _____]
- Other: _____

Customer Management:

- Lead prioritization and routing → [Your Example: _____]
- Retention intervention timing → [Your Example: _____]
- Upsell opportunity identification → [Your Example: _____]

- Other: _____

Typical ROI: 10-25% faster decision cycles

STEP 2: PRIORITIZE (10 minutes)

From your list above, select your top 3 opportunities and score them:

Opportunity #1: _____

Impact Score (1-5):

- 1 - Minor improvement
- 2 - Noticeable improvement
- 3 - Significant improvement
- 4 - Major improvement
- 5 - Transformational impact

Feasibility Score (1-5):

- 1 - Very difficult (missing data, complex integration)
- 2 - Difficult (some challenges)
- 3 - Moderate (standard complexity)
- 4 - Feasible (clear path forward)
- 5 - Easy (data available, simple integration)

Annual Cost of Current State: \$_____

(Time wasted x hourly rate, OR lost revenue, OR waste costs)

Priority Score (Impact x Feasibility): ___ / 25

Opportunity #2: _____

Impact Score (1-5):

- 1 - Minor improvement
- 2 - Noticeable improvement
- 3 - Significant improvement
- 4 - Major improvement
- 5 - Transformational impact

Feasibility Score (1-5):

- 1 - Very difficult (missing data, complex integration)

- [] 2 - Difficult (some challenges)
- [] 3 - Moderate (standard complexity)
- [] 4 - Feasible (clear path forward)
- [] 5 - Easy (data available, simple integration)

Annual Cost of Current State: \$_____

Priority Score (Impact × Feasibility): _____ / 25

Opportunity #3: _____

Impact Score (1-5):

- [] 1 - Minor improvement
- [] 2 - Noticeable improvement
- [] 3 - Significant improvement
- [] 4 - Major improvement
- [] 5 - Transformational impact

Feasibility Score (1-5):

- [] 1 - Very difficult (missing data, complex integration)
- [] 2 - Difficult (some challenges)
- [] 3 - Moderate (standard complexity)
- [] 4 - Feasible (clear path forward)
- [] 5 - Easy (data available, simple integration)

Annual Cost of Current State: \$_____

Priority Score (Impact × Feasibility): _____ / 25

STEP 3: VALIDATE YOUR TOP OPPORTUNITY (30 days)

Selected Opportunity: _____

Week 1-4: Data Collection Sprint

Track this process for 30 days and measure:

1. **Time:** How many hours per week are spent on this?

- Week 1: _____ hours
- Week 2: _____ hours
- Week 3: _____ hours

- Week 4: ___ hours

- **Total Monthly Hours:** ___ hours

2. **Volume:** How many times is this done per week?

- Average: ___ times per week = ___ times per month

3. **Error Rate:** How often does it go wrong?

- Errors per week: ___

- Error rate: ___ %

4. **Impact:** What does it cost when it fails?

- Cost per error: \$___

- Monthly error cost: \$___

5. **Delay:** How long between trigger and completion?

- Average delay: ___ hours/days

- Longest delay: ___ hours/days

Calculate Your Baseline ROI Potential:

Labor Cost:

• Monthly hours: ___ × Average hourly rate: \$___ = \$___ /month

• **Annual labor cost:** \$___ /year

Error Cost:

• Monthly error cost: \$___ × 12 = \$___ /year

Opportunity Cost:

• Delay cost (lost revenue, missed opportunities): \$___ /year

TOTAL ANNUAL COST OF CURRENT STATE: \$___

STEP 4: GO/NO-GO DECISION FRAMEWORK

■ GREEN LIGHT (Proceed with AI Implementation)

Check all that apply:

- [] Annual cost of current state is \$50K+
- [] Data is available (even if imperfect)

- [] Executive sponsor is committed
- [] Team is willing to change processes
- [] 6-month runway for implementation
- [] Clear success metrics defined

If you checked 5+, you're ready to move forward.

■■ YELLOW LIGHT (Address Prerequisites First)

Check all that apply:

- [] Problem isn't fully quantified yet
- [] No clear business owner for this initiative
- [] Organizational change resistance is high
- [] Too many competing priorities
- [] Data availability is uncertain
- [] Budget approval process is unclear

If you checked 3+, work on these issues before proceeding.

Action Items:

1. _____
2. _____
3. _____

■ RED LIGHT (Don't Start Yet)

Check all that apply:

- [] No specific problem identified ("we should use AI" mindset)
- [] Expecting AI to fix fundamental business/strategy issues
- [] No budget for maintenance and iteration
- [] Data doesn't exist or is completely inaccessible
- [] Executive team is not aligned
- [] Company is in crisis mode

If you checked 2+, AI is not the right focus right now.

Focus on:

1. _____

2. _____

TYPICAL AI IMPLEMENTATION ECONOMICS

Investment:

- **Initial:** \$15K - \$75K (development + integration + training)
- **Monthly Ongoing:** \$500 - \$2,500 (maintenance + platform fees)

Payback:

- **Typical Payback Period:** 3-9 months
- **Year 1 ROI:** 200-400%
- **Year 3+ ROI:** 500-1000%+

Your Projected ROI:

- **Your Annual Cost of Current State:** \$_____
- **Estimated Implementation Cost:** \$_____
- **Estimated Monthly Savings:** \$_____
- **Projected Payback Period:** _____ months
- **Year 1 ROI:** _____%

NEXT STEPS

This Week:

- [] Complete this assessment for your business
- [] Share with leadership team for input
- [] Conduct "complaint audit" with your team

This Month:

- [] Track your top opportunity for 30 days (use Step 3)
- [] Quantify current state costs
- [] Build business case for AI investment

This Quarter:

- [] Have learning conversation with peer who's deployed AI
- [] Finalize go/no-go decision

- [] If green light: Begin vendor selection or internal scoping

THREE SUCCESS FACTORS TO REMEMBER

1. ■ Start with a \$50K+ Problem

- Large enough to justify investment
- Small enough to solve quickly
- Clear ROI measurement

2. ■ Think Deployment, Not Demo

- Plan integration from day one
- Define ownership and maintenance
- Prepare for worst-case scenarios

3. ■ Measure Business Metrics

- Hours saved, not accuracy scores
- Revenue gained, not model performance
- Costs reduced, not technical metrics

RESOURCES

ROI Calculator: hynds.ai/roi-calculator

Case Studies: hynds.ai/case-studies

Discovery Call (No Sales Pitch): hynds.ai/discovery

Contact: john@hynds.ai | hynds.ai

This worksheet is designed to help you identify, prioritize, and validate AI opportunities in your business. Take your time working through each section, and be honest about your readiness. The right AI project at the right time can transform your business. The wrong project at the wrong time wastes money and creates skepticism.

Start with one problem. Solve it well. Then build from there.

Hynds.AI | Small to Mid-Sized Companies' AI Department