The worksheets

Five worksheets for deciding which AI use cases get funded. One for each stage: mine, size, test, prove and scale.

1	**Opportunity card**	Stage 1 · Mine
2	**Sizing sheet**	Stage 2 · Size
3	**Test charter**	Stage 3 · Test
4	**Live-run scorecard**	Stage 4 · Prove
5	**Portfolio report**	Stage 5 · Scale

How to use them

Pick one real use case and work through the sheets in order. A use case only moves to the next sheet, and only gets more money, when it has passed the one before. Print them, or fill them in on screen.

THE METHOD ON ONE PAGE

The money only grows as the evidence does.

Stage 1	Stage 2	Stage 3	Stage 4	Stage 5
No money	No money	A little	More	The most
Mine	**Size**	**Test**	**Prove**	**Scale**
Where could AI pay?	What's it worth, and is it ready?	Does it work on real cases?	Does it pay in live use?	Where else does it apply?
Ask	Worth	Owner	Supervised	Roll out
Look	Ready	Baseline	Cleared	Share
List	Standard	Target	Measured	Report

$$W = (V \times R \times P) - C$$

W	V	R	P	C
Worth	**Value**	**Reach**	**Probability**	**Cost**
Expected net value a year	A year, if it works everywhere it could	Share it can cover, 0 to 1	That it works to standard, 0 to 1	A year to run it

It's crude on purpose. It gets three honest numbers out of people who'd prefer to give one optimistic one.

STAGE 1 · MINE

One card per opportunity.

Opportunity card

Worksheet 1

NAME
A label the business would recognise

LENS
Productivity
Growth
Innovation

OWNER
Who answers for it

THE PROBLEM
What's slow, costly or missing today, and for whom

WHAT AI WOULD DO
The specific piece of work it takes on

WHO BENEFITS
The team or the customer, and how many

WHERE IT CAME FROM
The session, data or person that surfaced it

No owner, no card. If nobody in the business will put their name to it, it comes off the list.

Three checks before any money.

Sizing sheet

Worksheet 2

CHECK 1 Worth — What's it worth if it works?

V		R		P		C		W
Value a year if it works	×	Reach, 0 to 1	×	Probability, 0 to 1	−	Cost a year to run	=	Worth
	×		×		−		=	

CHECK 2 Ready — Is everything it needs there?

Is the data there, and can you get at it?

Are the customers or users there, and the route to them?

CHECK 3 Standard — Can AI beat the best of what's there?

The best result achieved today, by a person or a system

How you'll know AI has beaten it

The riskiest assumption

The one thing most likely to be wrong. This is what the first money tests.

Agree the target before the test.

Test charter

Worksheet 3

Signed by the owner before the test starts

Assumption
The one thing this test will prove or disprove

The test
The cheapest way to find out, on real cases

Cases
How many, and where they come from

Baseline
What it costs or earns today, with the source

Target
The result that counts as a pass

Budget and time
The ceiling on both

If it passes
What it gets next

If it fails
Stop, or the one change worth a second test

Owner in the business

Date

Worksheet 4

Live-run scorecard

MEASURE	BASELINE	TARGET	RESULT
Quality Share of AI output accepted without changes			
Volume Cases handled in the period			
Value Cost removed or revenue added			
Running cost In the period			
Human checking Hours spent reviewing			

Signed off before go-live

By the people who own each

☐ Platforms ☐ Data ☐ Security

Where the value landed

The budget line or revenue line it shows up in

Worksheet 5

Portfolio report

One row per use case, updated every quarter. Fill a dot for each stage a use case has passed.

USE CASE	LENS	STAGE	OWNER	MONEY RELEASED	BASELINE	RESULT	NEXT DECISION
		○○○○○					
		○○○○○					
		○○○○○					
		○○○○○					
		○○○○○					
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		○○○○○					
		○○○○○					
		○○○○○					

ENTERED
Use cases that came in

STOPPED
How many, and at which stage

RETURN
Value in use against money released

WHERE IT GOES WRONG

Six failures, and the fix for each.

WHAT YOU SEE	WHAT'S BEHIND IT	WHAT TO DO
Pilots that never end	No target was agreed before the test	Write the test charter, then restart the clock
Thirty use cases, all funded a little	Nothing was stopped at Size	Run the formula and fund the top few properly
Savings nobody can find in the accounts	No baseline, or no owner in the business	Don't release Prove money without both
A tool that works and nobody uses	It was built for the business, without it	Go back to Mine and find the owner first
Every use case is about cost	Only one lens was used	Run the Mine sessions again for growth and innovation
Each company builds its own version	Nothing is shared at Scale	One portfolio report, and proved use cases offered to the rest