

AI business case workbook

Build a funding case your team can discuss, with the costs, assumptions and next decision in one place.

A structured funding case	Space for costs and a downside case	A completed example with worked figures
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A free worksheet from ailevrg.com/guides/ai-business-case-template

Write a short case for the people funding the work. Link to the facts behind your figures, and record what still needs checking.

01 The project

Decision requested

Business goal and who benefits

Why the current way of working cannot meet that goal

Evidence of demand or a service problem

02 First project

The work we will change, from request to finished result

What AI will do

What people will do and approve

What is included, and what is left for later

03 Options

Keep the current approach

Improve it with existing tools or a change in process

Build the proposed AI workflow

Why this choice is worth funding

04 Cost and value

Period covered

Setup, connections, staff time, training and ongoing support

Cash spending we expect to avoid

Extra sales, less the cost of delivering them

Time released and what we will do with it

Effects on quality, waiting times or access to expertise

Sources and assumptions behind the figures

What happens if demand is lower or review takes longer?

05 Wider plan

What the first project builds that a later project could reuse

What the later project would still need

Evidence needed before expanding

Future value excluded from this funding case

06 Decision and responsibility

Money, staff time and access requested now

Who owns the result and who approves the spending

Checks required before launch

Reason to change or stop

Review date and next decision

A funding decision for a new planning service

Decision requested

Fund a defined demand check and delivery test from an agreed research budget.
Do not approve the full build on forecast sales alone.

Goal

Give strategy clients ongoing help without a full-service engagement.
First build: prepare one type of plan, checked by an expert before release.

Proposed first-year case

20 clients paying £1,000/month for 12 live months = £240,000 sales.
Direct delivery = £96,000. Setup = £60,000. Shared running = £24,000.
Net benefit = £60,000, before tax and financing.
At 10 clients for the same period, net benefit = -£12,000.
All figures are invented assumptions, not quotes or observed results.

Evidence needed

Client interviews and a concrete buying decision for the proposed offer.
A trial showing the full expert review and support effort.
A monthly forecast including slow uptake and displaced existing work.

What carries forward

Client records, agreed planning methods, access rules and review steps.
Possible later service: progress reviews. No later sales counted here.

Owner

Service lead, with finance checking costs and technology checking access.
Next decision:
Review the evidence and costs before committing to the build.
Stop or change the offer if demand or delivery cannot support the case.