

AI service opportunity worksheet

Connect a client or team need to a first service you can test, then decide what to learn next.

The need and the wider business goal

The first workflow and costs to check

A completed service-opportunity example

A free worksheet from ailevrg.com/guides/ai-for-professional-services

Use what you know already to compare ideas. This worksheet is optional; you do not need to complete it before speaking to us.

01 The project

People we want to serve

Recurring work they need to complete

Why our current service cannot meet that need well

Evidence from requests, delivery records or client conversations

02 Wider goal

New service, more clients, wider internal access or another change

What a useful result would look like

03 First workflow

From which request to which finished result

What our experts do

What the client or internal user does

What the system prepares or carries out

Required knowledge, records and permissions

04 Business case

Evidence of demand or internal need

Effect on existing paid work or team workload

Build, delivery, training and support costs to check

Main assumption that could make the idea fail

05 What could follow

Next service or team that could benefit

What it could reuse and what would still need building

06 Next decision

What we need to learn before committing

Who will find out and by when

An opportunity for ongoing client planning

Invented proposal. No demand, sales or test results are claimed.

Need

Strategy clients need help making their next plan between major projects.

Current limit:

The firm cannot offer frequent expert sessions to every client.

Goal:

A useful ongoing service that clients can act on themselves.

First build

One type of plan, prepared from approved methods and client goals.

An expert checks the advice. The client approves and carries out the work.

The system cannot spend money or change the client's systems.

First checks

Will clients buy and use it?

Can the firm deliver it well after expert review and support costs?

Does it replace existing work, and what does that do to the return?

Foundation

Current client records, written methods, access rules and approved plans.

Possible next use:

Progress reviews using those plans. Extra data and tests needed.

Next step

Show a sample to suitable clients and test the hardest delivery question.

Use the evidence to decide whether to fund the full build.