

AI ROI review workbook

Bring the costs, benefits and service results together to decide whether the next investment is justified.

A before-and-after review

Full costs and ROI calculations

A completed example and next decision

A free worksheet from ailevrg.com/guides/ai-roi

Use existing service and finance records where possible. Keep forecast and actual figures separate, and count each cost and benefit once.

01 The project

Business goal and workflow

Period covered, including when spending and benefits began

People responsible for delivery and checking the figures

Basis: cash spending / full costs including staff time

02 Before and after

Number of comparable jobs and teams or clients served

Time from request to useful result

Total staff time, including review and failed attempts

Quality and service standard

Use of the system and reasons for not using it

Other changes that could explain the result

03 Financial benefit

Cash spending actually avoided, with records

Extra revenue linked to the change

Direct cost of delivering that extra work

Contribution lost from existing work it replaced

Additional contribution = extra revenue – direct costs – lost contribution

Financial benefit = cash savings + additional contribution

Time released and what happened to it, counted only once

04 Full project cost

Build, data work, connections, testing and training

Software, support, source updates and repairs

Total cost, with shared costs counted once

05 Result

Net benefit = financial benefit – full cost

ROI = net benefit ÷ full cost × 100

Forecast versus actual result

Quality, access to expertise or speed gains recorded separately

06 Next investment

What a later project could reuse

Evidence of reuse and new work still needed

Continue / Change / Pause / Stop

Reason, person responsible and next review date

An ROI review after six live months

All figures and decisions are invented.

Period: setup plus six full live months

Financial benefit: £81,000 from nine extra reviews

Full cost: £96,000, including staff setup time

Net benefit: -£15,000

ROI: -15.6%, rounded

Latest month: £18,000 contribution less £6,000 running costs = £12,000

Payback: during month eight only if those monthly figures continue

Decision

Continue within the agreed budget and check demand and quality again.

Do not approve wider expansion from one strong month.

Next possible use

Progress reviews using the approved plans and existing client records.

Not yet built or sold. No future sales counted in this result.

Price the extra data work, testing and support before deciding.

Owner: service lead, with finance checking the figures

Next review: end of month seven

Change the plan if quality drops or the expected demand does not hold.