

AI use case worksheet

Turn an idea into a defined piece of work, with a useful result and a clear role for people.

The first workflow and its boundaries

Human decisions and required information

A completed client-planning example

A free worksheet from ailevrg.com/guides/ai-use-case-template

Keep the first version short. Someone should be able to explain the idea back to you without seeing a software demo.

01 The project

Name and person responsible

Business goal

Who needs the result, and what shows they need it?

What prevents us from providing it well today?

02 First workflow

What starts the job?

What does a useful finished result look like?

Current steps, waiting time and people involved

What the system will read, prepare or do

What people will check, decide or carry out

What is outside this first build

03 Knowledge and systems

Methods, records and rules the job needs

Where they live and who can approve access

Which systems must exchange information

What happens when a source is missing or two sources disagree

04 Value and the next step

Expected business benefit and evidence

Full build, review and support costs to check

What a later project could reuse

What that later project would still need

05 First decision

The biggest assumption to test

Cases that would reveal a problem

What would justify a build, a change or a stop

Person responsible and review date

Could an existing tool or a process change meet the same need?

An ongoing client-planning service

Goal

Help more clients apply our methods between major projects.

Demand: not yet proved. Check what clients need and would buy.

Owner: the person responsible for the service.

First workflow

A client submits a request to update one part of its plan.

The system finds the current agreement, goals and approved methods.

It checks for missing details and prepares a draft plan with source links.

An expert checks the advice and approves what the client receives.

The job ends with an approved plan and a record of the decision.

Outside this build

No changes to client systems, automatic spending or new service promises.

Other types of advice and a full client portal need separate agreement.

Required information

Current agreements, client goals, methods and previous approved decisions.

Keep each client's records separate. Name who maintains each source.

If something is unclear

Ask for the missing information or send the question to an expert.

Do not guess which agreement or rule applies.

What could follow

Progress reviews could use the approved plan and the same client records.

They would need fresh data, new checks and a separate delivery decision.

First test

Can the system apply the right method and spot when expert help is needed?

Use ordinary requests, missing agreements and conflicting instructions.

Count expert review and correction time.

Also test client demand and the cost of supporting the service.

Next decision

Agree the test and its spending limit before building the full service.
