

AI Opportunity Discovery Template

Workflow problem → use case → value hypothesis → solution route → next step

1. ASK ABOUT THE WORK FIRST

- Who does the work today?
- Where is it slow, costly, risky or inconsistent?
- What output should improve?
- Where would AI touch people, systems, tools or data?
- What value does the customer expect?

2. WRITE THE USE CASE IN ONE SENTENCE

At _____ (workflow step), _____ (who) uses AI to _____ (produce what) for _____ (work item), while _____ (human role) reviews or decides, so _____ (outcome) improves.

3. STATE THE VALUE HYPOTHESIS

Because _____ (current problem) affects _____ (stakeholder or outcome), improving _____ (step or output) with AI could help _____ (measurable improvement), which matters because _____ (customer priority).

Known (customer told or showed you)

Assumed (not yet proved)

Next validation step

Saved hours are capacity, not savings. Do not call it ROI until you have a baseline, cost, adoption and a path from time saved to business value.

4. ROUTE IN THREE QUESTIONS, THEN A FOURTH

- **Where will the person or workflow operate?** (the user or product surface)
- **What must the system do?** (retrieve, extract, classify, generate, review, recommend, coordinate)
- **Where and how will it run and be controlled?** (identity, permissions, approvals, retention, logging, human review)
- **Then: what should happen next?**

5. MATCH THE NEXT STEP TO THE EVIDENCE

What you see	Next step
Problem or stakeholder evidence is weak	Keep discovering
Use case and value are clear, requirements uncertain	Run a validation session
Technical, data, security or governance questions are material	Bring in the right technical or deployment owner
Customer is replacing an existing tool	Map current and target state