UNLOCKING AI ROI:
A Quick Check & Planning Tool for Business Leaders

Stop Chasing AI. Start Getting Value.

AI talk is everywhere, but most businesses are still figuring out where it actually fits. This tool helps you focus on real problems, use what you already have, and build the readiness to move forward.

Whether you're exploring use cases or trying to scale a pilot, this quick check helps you spot where you have traction, surface friction or misalignment and identify your next strategic move.

Here's how to use this tool:

- Reflect individually or with your team
- Choose 1–2 areas to act on in the next 30–60 days

AI ROI QUICK CHECK

For each statement, rate both: (A) *how important is this for us to get right today*, and (B) *how true it is for us today*. Then calculate the gap (A–B). Larger gaps highlight priority areas.

	HOW IMPORTANT TO US TODAY? 1 = not a priority right now → 5 = business critical	HOW TRUE IS THIS TODAY? 1 = not yet true → 5 = consistently true	COLUMN A – COLUMN B
STRATEGIC FOCUS	1 - 5 Score	1 - 5 Score	Gap
We're focused on AI use cases that solve real business bottlenecks, not just what's trendy.			
We've mapped where AI could remove friction or improve outcomes in specific workflows.			
DATA USE	1 - 5 Score	1 - 5 Score	Gap
We're using the data we have, not waiting for it to be perfect.			
We've identified which data gaps actually matter for what we're trying to achieve through AI.			
RESPONSIBLE AI USAGE	1 - 5 Score	1 - 5 Score	Gap
Our teams understand the ethical, security, and risk implications of using AI.			
We use AI to enhance human judgment and reduce friction — not to replace people blindly.			
TOOLING STRATEGY	1 - 5 Score	1 - 5 Score	Gap
We have a clear framework for when to adapt existing tools vs. when to pursue semi-custom or custom AI solutions.			
We evaluate AI tools based on how well they support our business goals and ways of working — not just technical capabilities.			
LEARNING & ADOPTION	1 - 5 Score	1 - 5 Score	Gap
We consistently learn from peers, advisors, or external partners to inform our AI direction and avoid known pitfalls.			
Cross-functional leaders are actively involved in shaping how we approach AI — this isn't isolated to one team.			

AI TO ROI ACTION PLAN

Use this section to plan next steps for the two areas with the biggest gap from page 2. You don't need to fix everything — just focus on where a small shift could improve clarity, confidence, or connection.

TOP TWO AREAS TO FOCUS ON

AREA TO IMPROVE	WHAT WE COULD TRY TO CLOSE THE GAP	WHO NEEDS TO BE INVOLVED

NEED A SOUNDING BOARD?

We help businesses get real ROI from AI. Reach out — we'd love to discuss! >>
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