

AI ROI Estimator Worksheet

This worksheet will help you evaluate and prioritize potential activities for AI implementation based on impact and return on investment (ROI) based on the AI Models & Methods talk by Lior Weinstein.

Step 1: Ideate Potential Activities for AI Implementation

Brainstorming Prompts:

1. If you had to 10x this activity, would you feel like you would break at the seams?
2. What activity currently generates the most customer complaints or errors?
3. What takes up the most time but seems like it shouldn't?
4. What task is a bottleneck in your operation?
5. If you could eliminate one task from your daily schedule, what would it be?
6. What do you spend a lot of money on that doesn't seem to provide adequate returns?

List your ideas here:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____

Step 2: Understand Levels of Autonomy

Original Levels of Autonomy (Inspired by the SAE Standards)

Level	1	2	3	4	5
Description	Assistance	Partial Automation	Conditional Automation	High Automation	Full Automation

Examples

Activity/Levels	Level 1	Level 2	Level 3	Level 4	Level 5
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Customer support emails	Suggest documentation	Draft parts of email	Draft entire responses	Handle issues, human checks	Handle issues, no human oversight
Social media management	Suggest post times or topics	Draft posts for human approval	Schedule posts	Manage and post, human alerted	Fully manage, no human oversight
Data analysis	Suggest data sources, structures, queries	Clean and prep data	Generate basic reports	Generate advanced reports, human checks	Produce and interpret reports, no human oversight
Sales calls	Suggest call list based on criteria	Draft initial outreach emails	Auto-dial and connect calls	Conduct calls with scripted responses, human checks	Fully conduct and analyze calls, no human oversight

Step 3: Calculate ROI Score Per Activity

AI ROI Score Formula

ROI = (Frequency x Investment x Savings Potential) / Cost To AI

Example: Social Media Management

Activity	Workload (Frequency)	Current Investment (Time/Cost)	Autonomy Level/Potential Savings %	Cost to AI (Time/\$)	ROI Score
Social Media Management	10 posts/week	60 minutes/post, \$40/hour, \$40 per post	2/20%	\$25/week software subscription	10 X \$40 X 20% = \$80 per week / \$25 = 3.2X ROI

Step 4: Assess and Prioritize Activities

Activity	Workload (Frequency)	Current Investment (Time/Cost)	Autonomy Level/Potential Savings %	Cost to AI (Time/\$)	ROI Score
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Action Plan

Based on your ROI scores, list the top 3 activities to AI and plan your next steps.

- 1. Highest ROI Activity: _____
- Next Steps: _____

You can customize this worksheet to best suit your organization's needs and always remember to reassess and update as you gain more insights.