

AI Brief Template

From faster tasks to a better workflow

Use this for one recurring piece of work. The purpose is to decide what is worth testing, not to produce an AI maturity score. Blank fields are questions for you to answer, not evidence that a problem exists.

1. Name the work

Workflow	
Accountable owner	
What starts the work?	
What counts as a finished, accepted result?	
Typical volume and measurement period	
Who receives the result?	

2. Establish the starting point

Record the source and confidence of each estimate. Include the whole process, not only the first draft.

Part of the work	Human effort per use case	Waiting or elapsed time	Evidence/source
Preparation and finding information			
Producing the initial result			
Checking and approval			
Corrections and exceptions			
Hand-offs and administration			

Current quality or acceptance measure	
Important errors and their consequences	

Current tools and incremental costs	
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3. Specify a change worth testing

What would change in the process?	
What should AI prepare, retrieve, check or automate?	
What must a person judge, approve or own?	
What data, permission or integration is needed?	
What should happen when the system is uncertain or fails?	
Who needs to learn a different way of working?	

Compare a simpler process, an existing tool and new engineering where relevant. AI is not always the answer.

4. Define a fair test

Comparable tasks or cases	
Baseline observation period	
Trial observation period	
Quality/acceptance criteria agreed before the test	
Who reviews the output?	
Setup and training effort	
Recurring human effort and operating cost	
What evidence would make us continue, change course or stop?	

5. Connect improvement to a business result

A reduction in effort is released capacity. It is not automatically cash, revenue or profit.

Where would released capacity go?	
What specific cost could genuinely be avoided?	
What additional work is there demand to deliver?	
Could the benefit instead be turnaround, quality or reduced workload?	
Which benefit can be measured without counting the same improvement twice?	

6. Make the next decision

Decision: investigate / run a bounded test / change the process / use an existing product / build / stop.

Owner	
Next action	
Date	
Evidence still missing	

TechGuidr helps businesses redesign work, make better technology decisions, build what matters and fix what is not working. An AI Work Review can help establish a practical starting point, a scoped AI Work Sprint puts selected changes into practice. Service details and current prices: www.techguidr.com.

This template is general working guidance, not a prediction of savings or a client case study. Do not enter confidential client or personal data into an unapproved AI tool.