

The AI ROI worksheet

Use this worksheet to evaluate an AI use case before you test, adopt or scale it. **Your answers save automatically in your browser** — print it when you're done.

1 What workflow are you trying to improve?

What specific tasks is this for?

2 Why does this matter?

What problem are we trying to solve?

3 What is the goal?

Check all that apply.

 Save time Reduce cost Improve quality Speed up delivery Support better stakeholder communication

4 What does the current process look like?

How is this work done today?

5 What is the baseline?

How long does this task take today?

Who is involved?

Current cost in time or effort?

6 What kind of AI opportunity is this?

 Try
A low-risk experiment **Pilot**
A live test in a real workflow **Adopt**
A use case ready for broader rollout

7 What inputs will the AI need?

What data, reports, templates, examples or context should be provided?

8 What could go wrong?

What are the risks to quality, trust, privacy or accuracy?

9 Who will review the output?

Who is responsible for checking the work before it is shared?

10 How will we measure success?

What should improve if this works?

- Time saved
- Cost saved
- Better quality
- Better consistency
- Faster turnaround
- Better stakeholder usefulness

11 What happened after the test?

What changed?

Time

Cost

Quality

Stakeholder value

12 What should we do next?

Choose one.

- Stop**
Park or shelve this use case.
- Refine**
Iterate before going broader.
- Scale**
Roll it out to the wider team.

Why?

Notes

Looking for AI capabilities that can help your research workflows?

Check out Rival’s conversational research platform to learn how smart AI tools can help you capture quant, qual and video feedback at scale.

rivaltech.com/demo