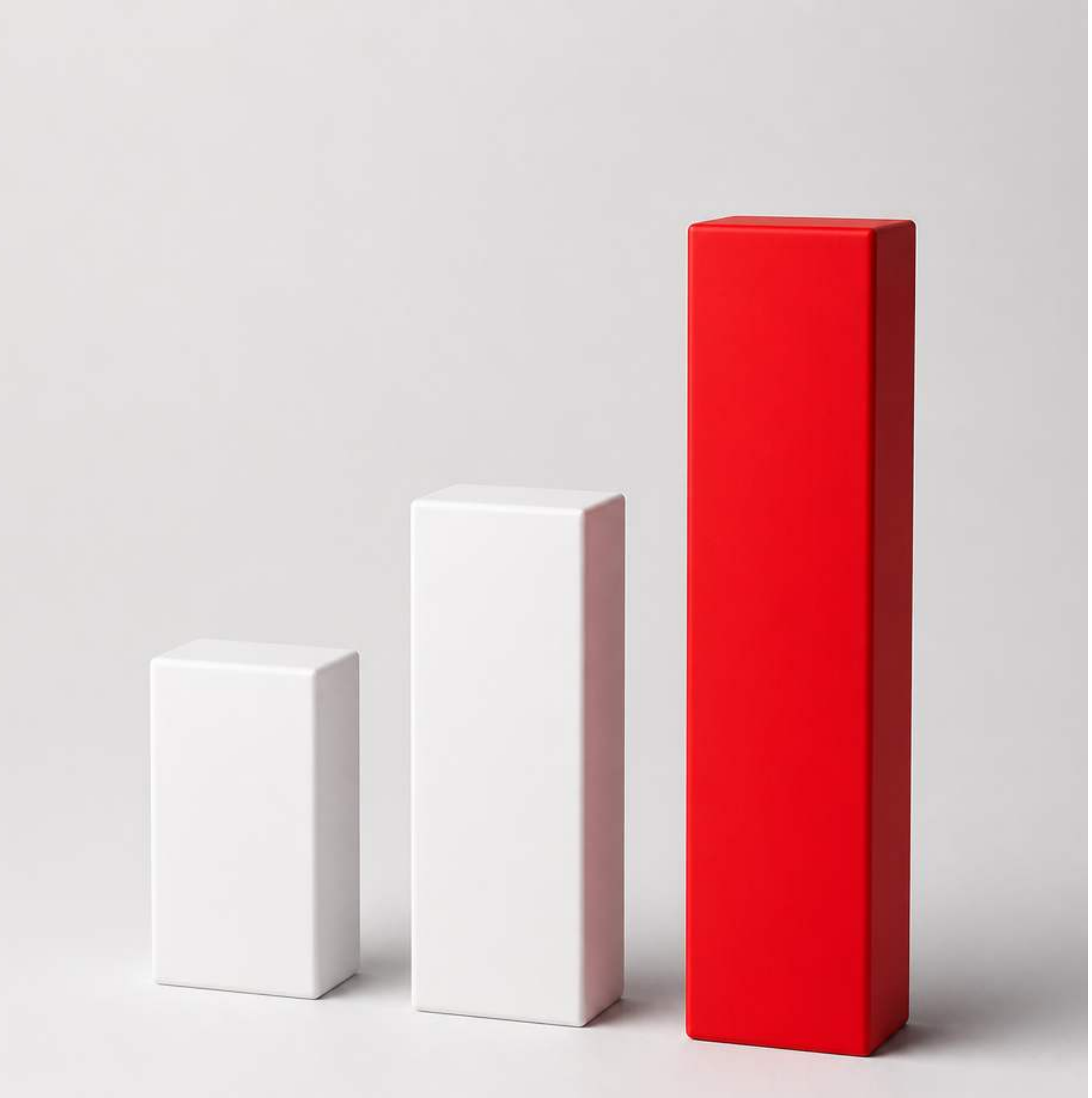

# AI ROI Tracker

Quantify the value your pilot delivered — and make the case for what comes next.

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# AI ROI Tracker

This tool picks up where your Pilot Brief and Experiment Log left off — turning evidence into a quantified result.

## About This Tool

**START Element**
T — Turn into Value

**Maturity Level**
**Level 3** — Building

**Who's Involved**
Leader and pilot owner

**Time to Complete**
45–60 minutes

What you'll leave with: A quantified honest summary of your pilot value — and a confident recommendation on what to do next.

# AI ROI Tracker

Measure what actually changed — not just what you hoped would change.

## What is it?

A structured tool that takes your pilot evidence — from your Value Definition Worksheet and Experiment Log — and turns it into a clear quantified picture of business value. What it cost. What it delivered. What the payback period looks like..

## Why Use it?

Few companies have achieved measurable payback from AI — largely because they track adoption not impact. This tool shifts the focus from "are we using AI?" to "what has changed because we used AI?"

## Benefits

A simple honest ROI summary — including hidden costs, risk factors, and payback period — that gives you confidence to make the right next decision.

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# What You Need Before You Start

### Pilot Brief (Lite)

Your success metric, target, and defined failure condition. If the ROI number is surprising, revisit the brief first.

### Value Definition Worksheet

Your baseline metrics, value type, and target. All calculations in this tracker are compared against your baseline.

### AI Experiment Log

Your green and amber value indicator entries, adoption signals, and pilot health checks. This serves as your evidence base.

**Garbage in, garbage out. Honest inputs produce useful results. Optimistic inputs produce comfortable ones.**

# The ROI Tracker: Turning Pilots into Numbers

## 1 What Comes Before

Your **Value Definition Worksheet** established your baseline and target. Your **Experiment Log** captured what you tested and learned. Both feed directly into this tracker — bring them to the session.

## 2 What This Produces

A quantified **ROI summary** — total cost, value delivered, ROI percentage, payback period, and confidence rating. Calculated in a shared spreadsheet. Presented in a format any decision maker can act on.

## 3 What Comes After

Your completed **ROI Tracker** feeds directly into the **Pilot Review** — where the decision is made. Scale, pivot, or stop. The tracker gives the Pilot Review its evidence base.

A pilot without a number is just a story. This turns your story into evidence.

# Use a Spreadsheet to Track ROI

Ensure transparent and auditable ROI calculations.

### Why a Spreadsheet?

Handles real numbers for calculation, comparison, and sharing. Centralizes financial data. Ensures transparency and auditability.

### What to Include:

Columns for cost component, amount, value delivered, ROI calculation, and confidence rating. Rows for each distinct cost or value type, with summary totals at the bottom.

### Where to Store It:

A shared Google Sheet or Excel file with a clear naming convention (e.g., "AI Pilot ROI — [Use Case] — [Date]"). Ensure accessibility for all stakeholders.

**Keep the tracking simple; focus complexity on the strategic thinking behind the ROI.**

# Why Most SMEs Can't Prove Their AI is Working

### Measure Impact, Not Activity

Focus on value metrics (e.g., time saved, efficiency gained) rather than activity metrics (e.g., prompts run, outputs generated). Tools used frequently but offering no real benefit have zero ROI.

### Account for Hidden Costs

Beyond subscriptions, consider less obvious costs like learning curves, training time, change management, and potential risks. Inaccurate ROI calculations can lead to scrutiny issues.

### Ask the Critical Question

Determine what the team actually does with the time saved by AI. Redirecting time to billable work is valuable; time absorbed by additional admin is less so. Track this distinction.

**Usage is not value. Measure what changed — not what happened.**

# Step 1: What did the pilot cost?

Include everything — not just the tool subscription.

| Cost item | Your figure (£/$) |
| --- | --- |
| Time — Hours spent by pilot owner and team × hourly rate | |
| Tool — Subscription or licence cost during the pilot | |
| Setup — Time spent briefing and onboarding the team | |
| Learning curve — Extra time in week one before the tool felt natural | |
| Risk — Any governance or compliance costs | |
| Total pilot cost = Add all five rows together | |

**The learning curve is the cost most SMEs forget. It's real — include it.**

# Step 2. What did the pilot deliver?

Fill in what you measured. The difference is your value.

| Measurement | Before AI | After AI | Difference |
|---|---|---|---|
| Time per task | __ hours | __ hours | __ hours saved |
| Tasks per week | __ | __ | — |
| Weekly saving | __ hours | __ hours | __ hours × £__ = £__ |

**What did your team do with the time they got back? Redirected to billable work, Redirected to higher-value tasks, Absorbed back into admin. Time absorbed back into admin is worth less than time redirected to client work. Be honest.**

# Step 3: Calculate Your ROI

Two calculations. Fill in your numbers.

| ROI Calculation | | |
|---|---|---|
| What you saved: £ | | |
| What you spent: £ | | |
| ROI = saved ÷ spent × 100 = ___% | | |
| **Payback Period** | | |
| What you spent: £ | | |
| Weekly saving: £ | | |
| Payback = spent ÷ weekly saving = ___ weeks | | |

**Under 4 weeks · 4–12 weeks · 3–6 months · Over 6 months**

# Step 3b. Add the Risk Cost.

Before you finalise — factor in what could go wrong.

- **Calculate Risk Cost**

  Probability it occurs (%) × Cost if it occurs = Risk cost. Add this to your total pilot cost before calculating ROI.
  Example: 5% × £10,000 = £500

- **Types of Risk to Consider**

  Data risk, Reputational risk, Compliance risk

An ROI that ignores risk isn't optimistic. It's incomplete.

# Step 4: Confidence Check

Assess your findings before sharing

### Baseline Reliability

Ensure the baseline is reliable, whether measured directly or estimated. State this clearly when sharing.

### Value Calculation

Confirm the value calculation is conservative. Exclude results that may not hold at scale.

### Cost Completeness

Verify all cost components are included, especially often-missed items like learning curve and risk costs.

### Replicability

Determine if the results can be replicated by another team member to assess scalability.

**Actionable Insights: All 'Yes' - Share with confidence. Some 'Partially' - Share with caveats. Any 'No' - Strengthen inputs first. Guiding Principle: A confident moderate ROI beats an unconfident high one every time.**

# Reading Your Results

What your ROI is telling you.

### Strong positive — high confidence — short payback

The pilot worked. Scale. Take to Pilot Review with clear expansion recommendation.

### Positive — moderate confidence — longer payback

Promising but gaps exist. Extend or rerun with better measurement.

### Break-even or marginal

Some value but not enough to justify scaling. Diagnose before deciding.

### Negative ROI

Pilot cost more than it delivered. Stop or pivot. Valuable information — saved you from scaling something that doesn't work.

**Every outcome is useful. Even a negative ROI tells you something worth knowing.**

# What Your ROI Is Telling You

### Strong positive ROI

- High confidence.
- Short payback.
- Consistent adoption.
- Take to Pilot Review. Recommend scaling.

### Positive ROI

- Moderate confidence.
- Promising but gaps exist.
- Extend or rerun with better measurement.

### Break-even or marginal ROI

- Some value but not enough to scale.
- Diagnose before deciding.

### Negative ROI

Cost more than it delivered. Stop or pivot.

Pilot Results

# AI Proposal Drafting: One-Page ROI Summary

Use Case:

AI Proposal Drafting

Pilot Details:

- **Period:** 4 weeks
- **Resources:** 3 consultants
- **Total Pilot Cost:** £1,050

Value Delivered:

- **Time Saved:** 38.6 hours
- **Monetary Value (Time Saved):** £2,895
- **Redirected Value (to billing):** £1,200

Key Metrics:

- **ROI Percentage:** 290%
- **Payback Period:** 1.5 weeks
- **Confidence Level:** High

Recommendation: Scale with governance review before client-facing use.

# Bring It All Together.

One page. Ready to share.

| Your ROI Summary | Your ROI Summary |
|---|---|
| Use case | |
| Pilot period | |
| Total pilot cost | |
| Value delivered | |
| ROI | |
| Payback period | |
| Confidence level | |
| Recommendation | |

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# Example | ROI Summary

AI-Assisted Proposal Drafting

| Completed ROI Summary | Details |
|---|---|
| Use case | AI-assisted proposal drafting using Claude |
| Pilot period | 4 weeks — 3 consultants |
| Total pilot cost | £1,050 (time + tool + setup + learning curve + risk) |
| Value delivered | 38.6 hours saved = £2,895 + £1,200 redirected to billing |
| ROI | 290% over four weeks |
| Payback period | 1.5 weeks |
| Confidence level | High — baseline measured, results consistent, adoption strong |
| Recommendation | Scale — full team rollout with governance review before client-facing use |

**Specific. Measured. Honest. That's what a good ROI summary looks like.**

# What to Do Next

ROI quantified. Now make the decision.


- **Scale**

  The pilot worked. Take ROI summary to Pilot Review. Use ROI to fund infrastructure for the next one.

- **Extend or Rerun**

  Promising but not definitive. Back to the Pilot Brief. Tighten scope, strengthen measurement, address hidden costs missed first time.

- **Stop or Pivot**

  Apply the learning. Use Experiment Log to find the most valuable insight. Take it to the next use case. A stopped pilot with clear learning is not a failure.

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