

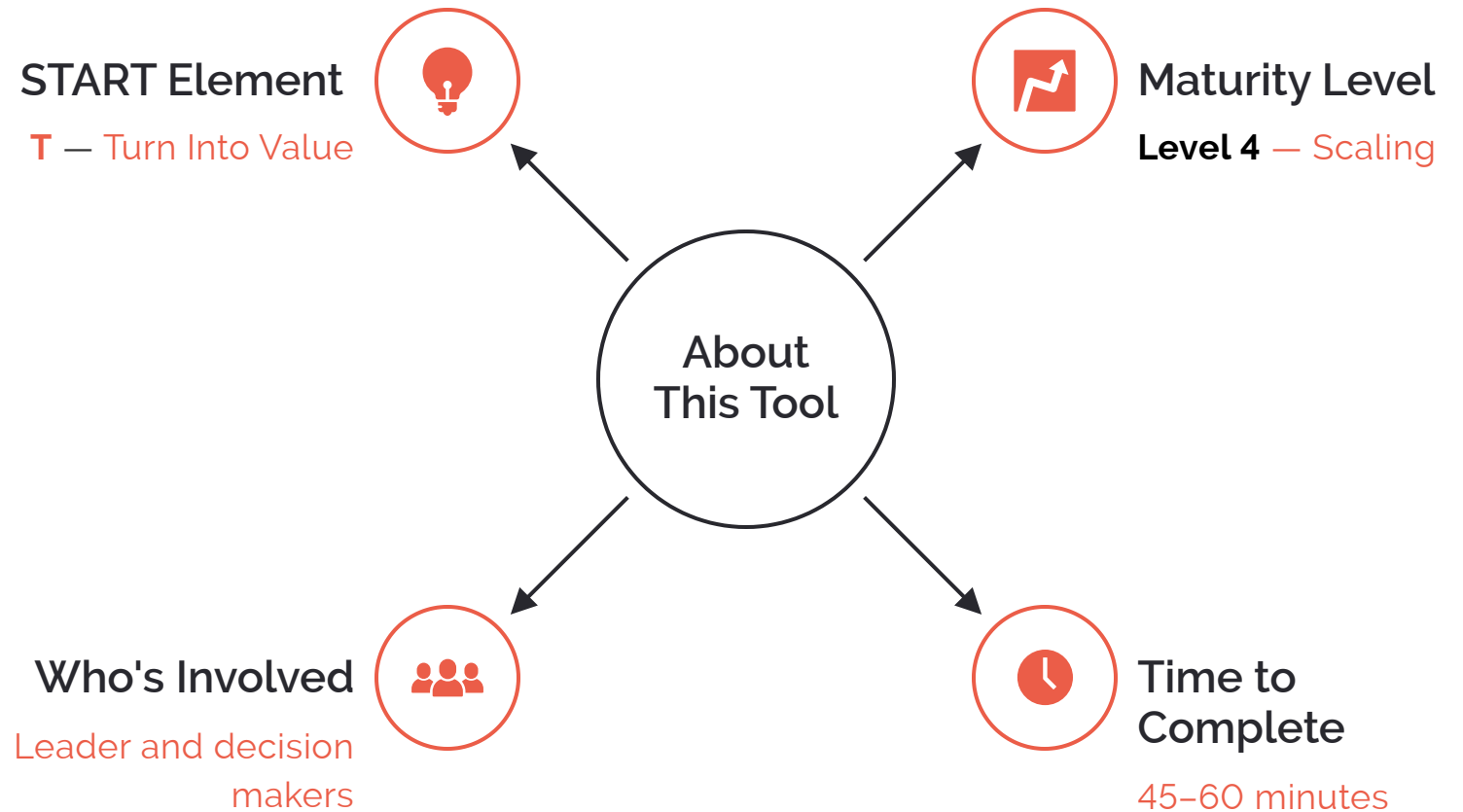


AI Business Case Template

Make the case for scaling your AI pilot — with evidence, not enthusiasm.

AI Business Case Template

Your pilot delivered. Now make the case to scale it.



What you'll leave with: A clear evidence-based case for scaling your AI use case — in a format decision makers can act on.

AI Business Case Template

Everything you need to **present your pilot results** and make the case for what comes next.



What is it?

A structured one-page template. Five sections. Plain English. Evidence-based.
Readable in under five minutes.



Why Use it?

A successful pilot that can't be communicated clearly doesn't get scaled. This translates evidence into a language decision makers act on.



Benefits

A concise credible business case that gives your decision maker everything they need to say yes.

Where This Fits in Your Journey



Start here only when the steps before are complete..

What You Need Before You Start



Pilot Review Template

Your structured review of what the pilot delivered — results, learnings, and your recommendation.



AI ROI Tracker

Your completed ROI calculation. The numbers in your business case come from here. Without them — you have an opinion, not a case.



Pilot Brief (Lite)

Your original hypothesis and success criteria. The business case shows how actual results compared to the plan.

A business case built on evidence is a business case that gets acted on. Build the evidence first.

Scaling AI Pilots

The Business Case Template

Structured Approach to Scaling AI Pilots

What is it?

A structured one-page template that makes the case for scaling a successful AI pilot — covering the problem, the evidence, the investment required, the expected return, and the recommendation.

Why use it?

A successful pilot that can't be communicated clearly doesn't get scaled. This template translates pilot evidence into a language decision makers understand and act on.

What you'll gain

A concise, credible business case that gives your decision maker everything they need to say yes — or to ask the right questions before they do.

The Five Sections of the Business Case

Five sections. One page. One decision.

1 The Opportunity

What problem does this use case solve and why does it matter now?

2 What We Tested

What we piloted, for how long, with whom, and under what conditions.

3 What the Pilot Delivered

The evidence: ROI, payback period, adoption, and confidence rating.

4 What Scaling Requires

Investment, timeline, resources, and governance needed to move from pilot to production.

5 The Recommendation

Scale, extend, or stop — and the one-sentence rationale.

Five sections. One page. That's all a good business case needs to be.

The Opportunity

Lead With the Problem — Not the Solution.



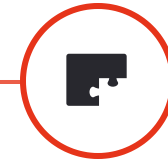
What specific problem does this solve?

Name the task, pain point, and impact. Use baseline numbers. "Consultants spend 2.8 hours per proposal" is a problem. "Improve efficiency" is not.



Why does this matter right now?

Connect to Vision Canvas direction. Strategic relevance makes a stronger case than operational convenience.



What is the cost of not scaling?

Time lost. Capacity constrained. Competitive advantage missed. Make the cost of inaction visible.

Make sure they understand the problem first — before you mention AI.

What We Tested

Keep this factual and specific. No editorializing.



Use case

One sentence describing exactly what was piloted.



Duration

How long the pilot ran.
Start date to end date.



Team

Who was involved.
Names and roles. How much time they committed.



Conditions

What data was used.
What guardrails were in place. What the pilot owner's specific role was.

This section should take two minutes to complete. The facts are already in your Pilot Brief.

What It Delivered

Pull these numbers directly from your AI ROI Tracker. Do not estimate.



Value delivered

Primary value type and quantified result (e.g., hours saved, cost reduced, or revenue enabled).



Total pilot cost

All five components combined (time, tool, setup, learning curve, risk cost).



ROI

Percentage and absolute figure from your ROI Tracker calculation.



Payback period

How quickly the pilot paid for itself (in weeks or months).



Adoption signal

Did the team actually use the tool consistently (Yes / Partially / No)? What the pattern showed.



Confidence rating

High / Moderate / Low – and one sentence explaining why.

Note: Every number on this slide comes from your completed AI ROI Tracker spreadsheet. If a number isn't there — go back and complete the tracker first.

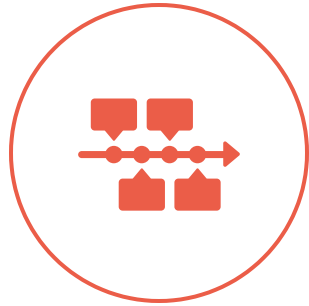
What Scaling Requires

Be honest about what scaling actually costs.



Investment Required

Tools, people, training, and governance. Break it down using a table: Item · Cost · One-off or Recurring.



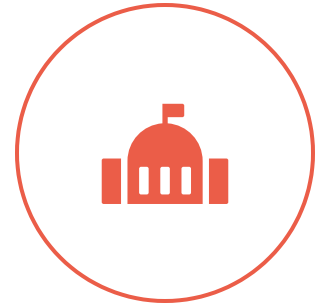
Timeline

From decision to full deployment. Be realistic, including a learning curve and change management.



Involvement

Identify roles, responsibilities, and any external support needed.



Governance

Define additional guardrails, oversight processes, or compliance considerations.

A business case that underestimates the cost of scaling creates problems later. Recommend building a simple scaling cost spreadsheet for transparent investment and visible timeline.

One Recommendation.

Written Down Before You Leave the Room.



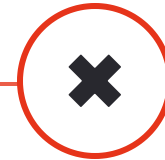
Scale

The evidence supports it. Move to full deployment.



Extend

Promising but not conclusive. Run a second pilot with one specific change.



Stop

The evidence doesn't support scaling. Document the learning and move on.

One Recommendation. Don't End the Meeting Without It.

Communicating Your Case

Different audiences need different conversations.



- **To a decision maker**

Lead with ROI and payback period. Support with evidence summary. Close with recommendation and required action. Two minutes maximum.

- **To your team**

Lead with what it means for them: time saved, work improved, next phase. Focus on the benefit to people, not the technology.

- **To a client or partner**

Lead with outcomes: what improved and by how much. Never lead with how the technology works.

The same case told three different ways. Know your audience before you open your mouth.

A Business Case That Ignores People Fails at Implementation.



Identify Affected Roles

Name the roles involved and describe the changes to their work. Note if they were part of a pilot or if this is entirely new for them.



Training and Support Needs

Include costs for learning time, prompt library access, and ongoing support.



Engage Stakeholders

Secure day-to-day champions to ensure scaling success, as neglecting user engagement is a common failure point.

Technology scales in weeks, but people scale in months. Plan for both.

What To Do Next

Three Possible Outcomes. One Clear Next Step Each.

1

Approved

Move to the AI Roadmap Template, map the 12-month plan for AI across your business, and build on this use case as your first proven foundation.

2

Approved with conditions

Address conditions first by defining them clearly, assigning an owner and a deadline, and then resubmit when met.

3

Not approved

Understand why the case was not approved (evidence, cost, timing, or risk) to know what to fix or if a different use case should be revisited.

Start Smart. Stay Strategic.

The Strategic Mind

— START SMART. STAY STRATEGIC —