

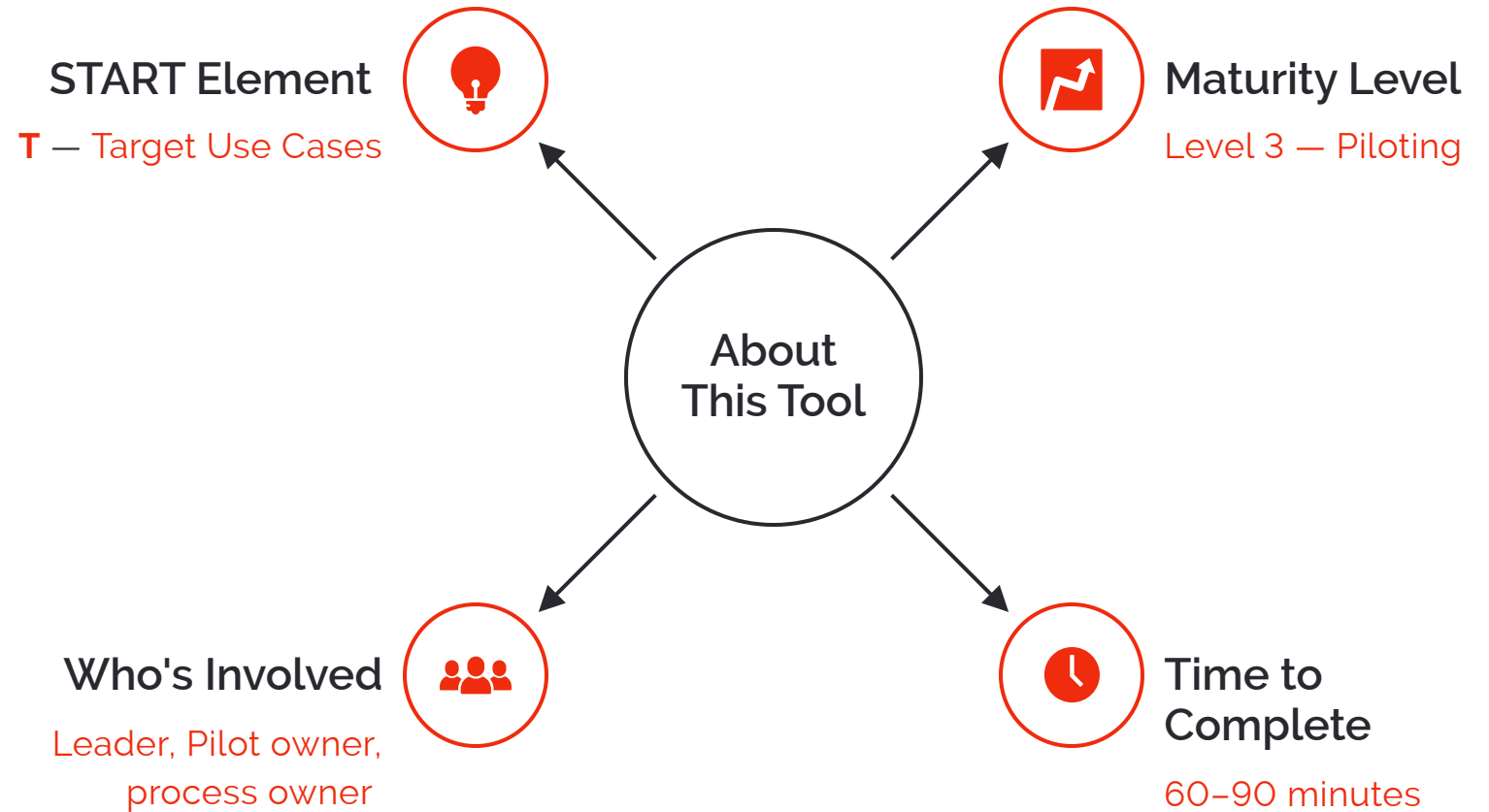


Use Case Canvas

Define your chosen use case in full — before your pilot begins.

Use Case Canvas

The deep-dive definition that turns a prioritised use case into a pilot-ready brief.



What you'll leave with: A fully defined use case — problem, process, data, people, and success criteria — ready to move into the Pilot Brief.

Use Case Canvas

A one-page blueprint that turns a prioritized idea into a **structured, pilot-ready definition**.



What is it?

A structured one-page canvas that defines every dimension of your chosen AI use case — from the problem it solves to the data it needs, the people it affects, and what success looks like.



Why Use it?

Most AI pilots fail not because the idea was wrong — but because it was never properly defined before starting. Vague use cases produce vague results. This forces the precision that successful pilots require..



Benefits

A complete shared definition of your use case — so everyone involved understands the problem, the approach, the boundaries, and the success criteria before a single experiment runs.

Two things must be completed first



Use Case Prioritisation Matrix

You have a chosen use case — your top-scored idea from the matrix. The canvas takes that idea and defines it in full. If you haven't prioritised yet — do that first. **Don't canvas an idea you haven't scored.**



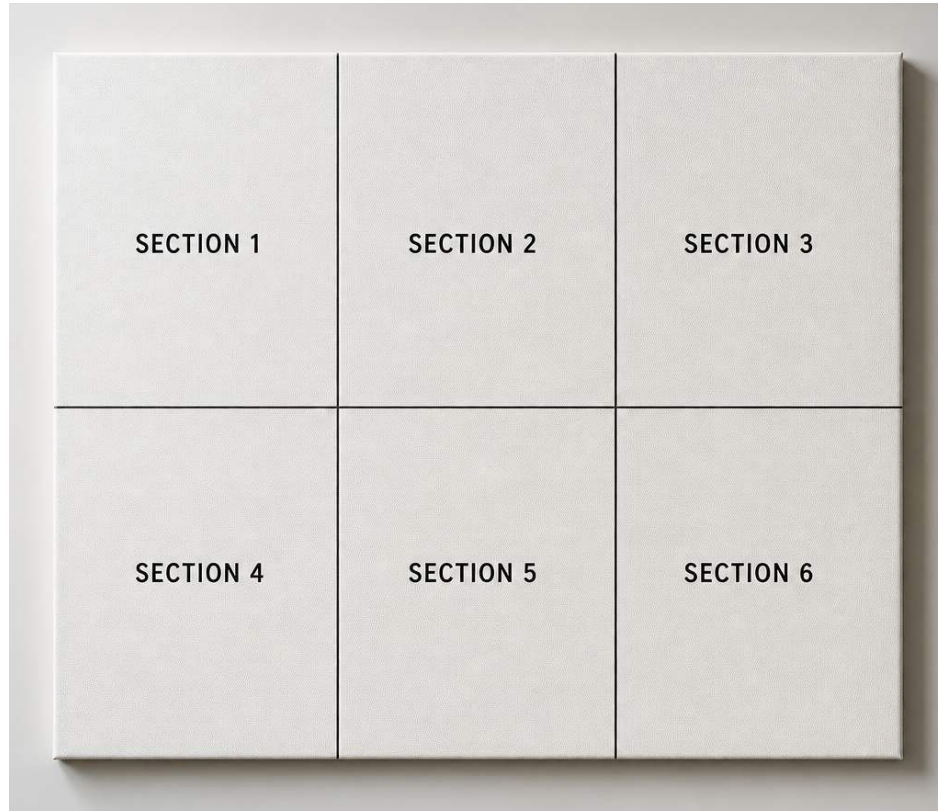
AI Governance Guardrails

Minimum governance rules must be in place before you define the data and oversight requirements for a specific use case. The canvas asks about data classification — you need your guardrails to answer that question honestly.

The canvas is the bridge. Make sure both sides of the bridge are solid before you cross it.

Six Sections: One Complete Definition

Complete all six sections in order. Each section informs the next.



1

The Problem

What specific problem does this use case solve?

2

The Current Process

What is the current process, step by step?

3

The AI Solution

What will AI do — and what stays human?

4

The Data

What data does this use case need, and is it ready?

5

The People

Who is involved — and who is affected?

6

The Success Criteria

What does good look like — and how will you measure it?

Complete all six. In order. Each section informs the next.

The Problem

Start with the problem, not the solution.



Specific Problem

Name the task, the pain point, and the impact in one precise sentence. Example: 'Senior consultants spend 3 hours per proposal on first drafts'.



Business Relevance

Connect the problem to your Vision Canvas direction. If it doesn't connect, reconsider if this is the right use case.



Cost of Inaction

Quantify the consequences of not solving the problem: time lost, errors, consumed capacity, or missed revenue. This will be the opening line of your business case.

If you can't describe the problem in two sentences, the use case isn't defined enough yet. Go back to the Prioritisation Matrix.

Map How It Works Today

Establish Your Baseline Before Introducing AI



A↔B

Document the Current Process

Detail every step of the existing workflow, including manual tasks and workarounds, from start to finish.



Identify Roles and Timings

Name the people and roles involved in each step and estimate the time taken. This forms your baseline measurement.



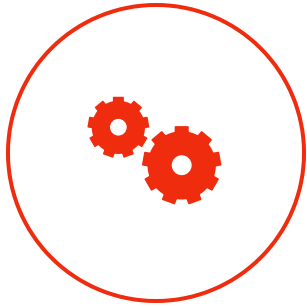
Pinpoint Process Breakdowns

Locate the specific steps where the most time is lost, errors occur, or frustration arises. This is the optimal area for AI intervention.

Investing time in mapping the current process is crucial for effective improvement; it yields benefits at every subsequent stage.

AI's Role vs. Human's Role

Be precise about what AI does — and what stays human.



Specific AI Tasks

Clearly define each task AI will perform (e.g., draft, summarize, analyze, classify) and its exact position in the workflow. Focus on one task, one step, not vague improvements.



AI Tools

Name the specific AI tool being used. Refer to resources like the Small Business AI Starter Kit for guidance on useful tools for SMEs.



Human Oversight

Define the essential human roles in the process, such as review, approval, editing, or overriding. A human-in-the-loop is non-negotiable and must be defined before pilot initiation.

AI performs the task, and a human verifies the output. This is the minimum requirement. Define both roles before starting.

The Data

Know What Data You Need — And Whether You Can Use It.



What data is needed?

List every specific data source. E.g., 'client proposal briefs stored in Google Drive' instead of 'customer information'.



Is it available, clean, and accessible?

Score each source: Ready / Partial / Not ready. Address 'Not ready' sources before the pilot begins.



What are the data rules?

Classify each source:

- Safe to use (non-sensitive internal content),
- Check first (anonymize or use enterprise tools),
- Never use (client data, financials, personal information).

Use a simple spreadsheet to track data sources (availability, readiness score, classification) and share it with the pilot owner. Data readiness is crucial and honesty here saves significant pain later.

The People

Who Is Involved — And Who Is Affected?



Who Is Involved?

Pilot owner (one named person accountable for running the pilot, capturing data, and reporting back), **Team members** (everyone who will use the AI tool during the pilot, named and briefed before the pilot starts), **Stakeholders** (who needs to be kept informed, how often, in what format).



Who Is Affected?

This is the workforce impact question most canvases miss. AI doesn't just involve people — it changes how they work. Whose role changes? How significantly? Have they been told? Have their concerns been addressed? If the affected team hasn't been engaged, complete ***Getting Your Team on Board*** before this pilot begins.

Involving people and affecting people are different things. Address both before you start.

Success Criteria

What does good look like — in numbers, not feelings?



What does success look like?

Directly from your Value Definition Worksheet. Same number, same metric, same timeline. Time saved, cost reduced, quality improved, or revenue enabled — expressed as a specific measurable target.



What would tell you this has failed?

Your defined failure condition. If improvement falls below X by week Y — we stop and review. Define this now while thinking clearly.



How will you measure it?

Data source, frequency, named owner, and where it's stored. A simple shared spreadsheet — one row per week, one column per metric — is all you need.

If your success criteria section is vague — go back to the Value Definition Worksheet. The numbers should already be there.

Pilot Brief Readiness Checklist

Ensure all requirements are met before proceeding.



Problem Description

The problem is described in one or two specific sentences.



Current Process Mapping

The current process is mapped step by step with time estimates.



AI Role Definition

AI's specific role is defined, and the human review step is named.



Data Source Classification

Every data source is classified, and 'Not ready' sources have an action plan.



Team Identification and Engagement

The affected team is identified, and engagement is planned.

All five checked? Move to Pilot Brief. Any unchecked? Complete the section first.

Canvas complete. Here's what happens next.



Move to the Pilot Brief

Your completed canvas is the primary input for your Pilot Brief (Lite). The hypothesis, success metric, scope, data rules, and ownership sections of the brief should all flow directly from the canvas.



Complete the Value Definition Worksheet

If you haven't already — now is the moment. Your success criteria section gives you the starting point.



Complete the Pilot Readiness Checklist

Before the pilot starts — five questions, all must be yes. Your canvas gives you most of the answers.

Start Smart. Stay Strategic.

Meridian Advisory (example)

AI-Assisted Proposal Drafting Use Case

1

Problem

Senior consultants spend 3 hours per proposal on first drafts, totaling 8 proposals per week. This represents a cost of £1,800/week in senior time for a low-value task.

2

Current Process

Client brief → consultant drafts proposal (3 hours) → senior review (45 minutes) → client submission. Total time: 3.75 hours per proposal.

3

AI Solution

Utilize Claude Pro for drafting the initial proposal from the client brief, followed by consultant editing and senior review before client submission.

4

Data

Client briefs and previous proposals are internal and safe for use. No client names or financials will be included in prompts.

5

People

Pilot owner: Sarah Chen. Three consultants involved with briefing. Management informed weekly. A change management session is planned before the pilot.

6

Success Metrics

Under 1 hour per proposal by week 4. Failure if no improvement by week 2. Weekly time log, Sarah Chen, shared Google Sheet.

Specific. Defined. Bounded. That's a canvas ready to move to the Pilot Brief..

The Strategic Mind

— START SMART. STAY STRATEGIC —