AI Value and Cost Worksheet

Choose value measures, establish a baseline, and count delivery and operating costs.

For: Sponsors, product owners, and finance partners | Use when: Before the build and at the outcome review | Suggested time: 25 minutes

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Use synthetic or authorized information. Keep sensitive work in approved tools. A named person owns each decision. These tools support discussion and planning; they are not validated assessments.

1. Choose the value that matters

Use the seven layers: efficiency, scale, quality, experience, risk, capability, and financial impact. Select only those relevant to this workflow.

Workflow and outcome

What result matters, and to whom?

Priority measures

Choose a small set with units, data source, owner, and case mix.

Baseline

What happens today, over which period, and how reliable is the evidence?

Target and period

What useful improvement would justify continuing?

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2. Account for effort and spending

Count each benefit once. Time released is capacity unless spending actually changes. Compare benefits and costs over the same period.

Capacity calculation

Volume x minutes saved / 60. State the assumptions.

Financial mechanism

What actual change in spending or revenue connects to the benefit?

One-time costs

Build, integration, change, training, and evaluation effort?

Recurring costs

Tools, usage, support, monitoring, maintenance, and human review?

Observed result and decision

Complete after the review; distinguish measured results from targets.

Owner and review date

Who owns the evidence and next decision?

Completed companion example

All organizations, workflows, numbers, and results in these examples are fictional and provided for learning. Targets are proposed decision criteria, not validated standards or promised outcomes.

Workflow and outcome

Routine policy questions receive supported answers with less total active handling effort.

Priority measures

Active handling minutes per question; corrected claims per reviewed draft; missed escalations.

Baseline

Illustrative baseline: 15 minutes per routine question, including specialist review.

Target and period

Illustrative target: 9 minutes for the same case mix, with supported citations and defined escalations preserved.

Capacity calculation

Assume 300 questions/month x (15 - 9) minutes / 60 = 30 hours/month of capacity.

Financial mechanism

None established. Do not call the 30 hours cash savings.

One-time costs

Illustrative: $3,000 including assigned delivery and training effort.

Recurring costs

Illustrative: $250/month incremental tool and support cost; review time is included in handling minutes.

Observed result and decision

Not yet measured. Owner will compare the same case mix before making an expansion decision.

Owner and review date

Service-desk lead with finance partner; two weeks after the pilot starts.

Original guide: https://builtinto.work/resources/value-and-cost