

AI Use-Case Worksheet

1. Get to know the business

Type into the fields or print and write. Use general descriptions; leave out passwords, customer records and confidential details.

Business / completed by / date

What do we do, who do we serve, and who handles the work?

What takes too much time, gets missed, or causes frustration?

Start the conversation

"I run a [type of business] serving [customers]. Our team handles [work]. We lose time on [problem]. Ask me questions about the business and help me choose one small, useful AI task. What do you need to know first?"

List up to three small jobs worth exploring

Ask AI: **"How should I ask you to help with this task? What haven't I thought to ask?"**

Learn how it responds as you explain your work. Keep useful instructions somewhere you control; memory varies by tool and settings.

AI Use-Case Worksheet

2. Choose one job and agree on a plan

Pick a task whose result someone can check. Ask the AI to explain its actual capabilities before granting access or approving actions.

The first task and the finished result we want

How we do it today: frequency, time spent, and main steps

What information is needed, and is it approved for this tool?

Proposed steps, required tools / access, and any limitations

What must it leave alone? What actions need my explicit approval?

Who will check the work, and what happens if it is wrong?

Approval checkpoint

"Show me the plan first. Explain the access you need and the actions I must approve. Start with a small trial. Do not move or delete messages, send anything, or change records until I approve the specific actions."

AI Use-Case Worksheet

3. Try it, give feedback, and improve

Use a small sample first. Include preparation, review and corrections when deciding whether the task saves time overall.

Example: a conversation about email

Owner: "Email takes too much time. Eventually I want folders and summaries in the morning, after lunch and at 5 p.m."

AI: "Which messages matter most? What exact times and time zone? Should we start with a sample summary and leave messages untouched?"

Owner: "Yes. Put customer deadlines first. Show me the plan and approvals."

Illustrative only. Scheduling and email actions depend on the tool and connections.

Our small trial: sample, dates, and what success looks like

If scheduled: exact times, days, time zone, and delivery method

What worked? What was missed? What instructions should change?

Time before / time with AI, including review and corrections

Next decision: repeat, revise, expand, or stop - and why?

Keep learning together: review each result and explain what you would change. Save the agreed instructions. Add another task when the first one is useful and reliable.