FREE TEMPLATE

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AI Opportunity Finder



Score 20 everyday processes and find the three where AI pays back first.

Strategy, Operations, Quick wins

Imran Anwar · Fractional Chief AI Officer

imrananwar.ai

How to use this

Most businesses start with AI in the wrong place. They pick the shiniest idea, not the one that pays back. This sheet fixes that.

1. Get two or three people round a table who know the day-to-day work. Give yourselves 45 minutes.
2. Score each process on page 2 from 1 to 5 against the five criteria below. Go with your gut. Don't debate a single score for more than a minute.
3. Add up each row. Highest totals rise to the top.
4. Pick your top three on page 3, give each one an owner and a first step this month.

Check the red flags before you commit.

The five criteria

Score every process 1 to 5 on each. A higher score always means a better place to start.

Criterion	What it asks	1 means	5 means
A. Hours	How much team time goes on this each week?	Under 1 hour a week across the team	Over 20 hours a week across the team
B. Repetitive	How similar is the task each time?	Different every time, needs fresh judgement	Same steps, same inputs, nearly every time
C. Data ready	Is the information it needs digital and easy to reach?	On paper, in heads or scattered everywhere	Digital, in one or two systems, reasonably tidy
D. Low risk (reverse scored)	How bad is it if the output is wrong?	A mistake hurts customers, money, people or the law	A mistake is cheap, easy to spot and easy to fix
E. Impact	Does doing it better help customers or revenue?	No one outside the team would notice	Customers feel it fast or revenue moves

Reverse scored means you flip your instinct. High risk gets a **low** score, so risky processes sink down the list.

Maximum total per process: **25**.

Scoring table

Score each box 1 to 5. Add A to E for the total. Use the last two rows for processes specific to your business.

Quick read of your totals

- **20 to 25:** strong candidate. Shortlist it.
- **14 to 19:** worth a look once the first wins are in.
- **Under 14:** park it for now.

A tie? Pick the one with the higher score in D (low risk). Early wins should be safe wins.

#	Area	Process	A. Hours	B. Repetitive	C. Data ready	D. Low risk	E. Impact	Total (out of 25)
1	Sales	Writing proposals and quotes						
2	Sales	Updating the CRM after calls and meetings						
3	Sales	Researching prospects before a meeting						
4	Marketing	Drafting social posts and newsletters						
5	Marketing	Turning one piece of content into several formats						
6	Marketing	Pulling together the monthly marketing report						
7	Customer service	Replying to common customer emails						
8	Customer service	Sorting and routing incoming enquiries						
9	Customer service	Summarising customer feedback and reviews						
10	Finance	Entering and coding supplier invoices						
11	Finance	Chasing overdue payments						
12	Finance	Writing month-end commentary on the numbers						
13	Finance	Checking expense claims						
14	HR	Writing job adverts and role descriptions						
15	HR	Shortlisting CVs						
16	HR	Answering staff questions about policies						
17	HR	Preparing new starter onboarding packs						
18	Operations	Taking meeting notes and action lists						
19	Operations	Writing and updating process documents						
20	Operations	Planning rotas, schedules or stock orders						
21								
22								

Your top three

Take your three highest totals. Sense-check them against the red flags below, then fill this in.

	Process	Why it pays back first	Owner	First step this month
1				
2				
3				

Good answers look like this. "Why it pays back first" names the time or money at stake in one line. "Owner" is one named person, not a team. "First step" is something you can finish in under two weeks, such as "Run 20 real customer emails through an AI draft and compare with what we sent."

Red flags: don't start here

Tick any that apply to a shortlisted process. One tick means think twice. Two ticks means pick another.

- [ ] **It decides about people.** Hiring, pay, performance or anything that affects someone's job. Start with drafting help, never the decision itself.
- [ ] **It uses sensitive personal data** and you haven't checked how UK GDPR (or your local data rules in the GCC) applies.
- [ ] **No one owns it.** If nobody is accountable today, AI won't fix that.
- [ ] **The process is already broken.** Automating a messy process gives you a faster mess. Tidy it first.
- [ ] **A wrong answer goes straight to a customer** with no human check in between.
- [ ] **The data lives on paper or in one person's head.** Get it written down first.
- [ ] **It happens a few times a year.** Low volume rarely pays back, no matter how clever the tool.
- [ ] **It needs a big system change** before you can even test it. Look for something you can trial in weeks, not months.

Before you start any of the three, agree how you'll measure it. Note the hours spent today, so in 90 days you can show the difference.

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Want help running this?

This sheet gets you a shortlist. The hard part is turning three good ideas into results your team actually uses.

I run this exercise with leadership teams at 50 to 200 person businesses across the UK and the GCC. We score the processes together, pressure-test the top three, and leave with a 90-day plan and named owners.

Use the template alone, or bring me in to run it.

Book a 30-minute call at imrananwar.ai

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hello@imrananwar.ai

Imran Anwar

AI strategy from someone who builds it.

More free tools from my board work at imrananwar.ai: 90-Day AI Roadmap, AI ROI Worksheet, Board AI Briefing and the AI Acceptable Use Policy.