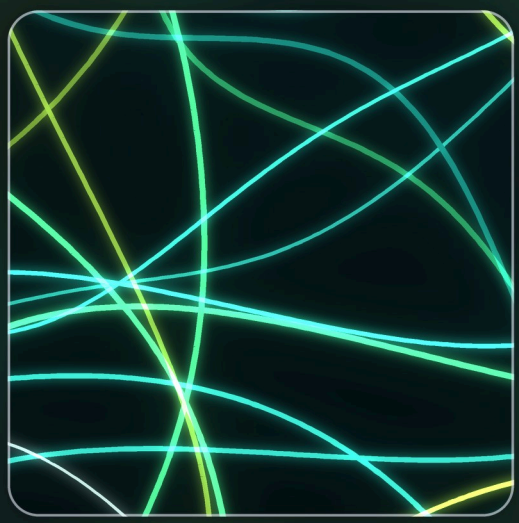
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The AI ROI Worksheet



Cost, time saved and payback, with a worked example for your finance director.

Finance, ROI, Board

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AI ROI Worksheet

Cost, time saved and payback, with a worked example for your finance director.

How to use this

Pick one AI use case. Just one. Fill in the three blocks below in pounds. Everything is monthly except the one-off costs.

1. **Costs.** What you pay once to get going, and what you pay every month to keep it running.
2. **Benefits.** What you get back each month. Only count what you can measure.
3. **Results.** Three simple sums tell you whether it pays, and how fast.

Use real quotes and real timesheets where you can. Where you have to guess, write it down and say so. Then run a low case on page 2 before anyone signs anything. A worked example follows on page 3 if you want to see it done first.

Block 1: Costs

One-off costs (paid once)

Item	What to include	£
Set-up	Supplier or consultant fees to configure it	
Integration	Connecting it to your email, CRM or other systems	
Training	Courses, workshops, guides for staff	
Internal time	Your own people's hours on the project, at loaded cost	
Total one-off cost		

Ongoing costs (per month)

Item	What to include	£ per month
Licences	Seats or subscriptions	
Usage	Pay-as-you-go charges based on volume	
Support	Supplier support, maintenance, IT time	
Review time	Staff hours checking AI output, at loaded cost	
Total ongoing cost per month		

Block 2: Benefits (per month)

Benefit	How to work it out	Your workings	£ per month
Hours saved	Hours saved per month x loaded hourly cost		
Less error or rework	Hours of rework avoided x loaded hourly cost, or the cost of errors avoided		
Extra revenue or faster cash	Only if you can measure it. Otherwise write £0		
Total monthly benefit			

Block 3: Results

Result	The sum in plain words	Answer
Net monthly benefit	Take the total monthly benefit and subtract the total ongoing cost per month	£
Payback	Divide the total one-off cost by the net monthly benefit	months
First-year return	Multiply the net monthly benefit by 12. Subtract the total one-off cost. Divide what is left by the total one-off cost, then multiply by 100	%

Reading the results

- If the net monthly benefit is zero or below, the project does not pay as planned. Change the scope or stop.
- Payback tells you how many months until the one-off cost is earned back.
- First-year return tells you what you get back in year one for every pound you put in up front, after that pound is repaid. 100% means you doubled it.

Low case (run this every time)

	Your best estimate	Your low case
Total monthly benefit	£	£
Total ongoing cost per month	£	£
Net monthly benefit	£	£
Payback (months)		
First-year return (%)		

Be honest with your numbers

- [ ] **Count review time.** Someone has to check what the AI produces. Those hours are a cost, every month.
- [ ] **Use loaded cost, not salary.** Add employer costs and overheads to salary, then divide by the hours a person actually works in a year. Ask your finance team for the figure they use.
- [ ] **Only count hours saved if the time goes somewhere useful.** If nobody does anything different with the freed-up hours, you have not saved money. Name where the time goes.
- [ ] **Run a low case.** Cut your benefits by about a third and see if it still pays. If it only works on the best case, it is a bet, not a plan.
- [ ] **Leave out revenue you cannot measure.** "Happier customers" is real but goes in the notes, not the sum.
- [ ] **Include internal time in one-off costs.** Your own team's hours on set-up are not free.
- [ ] **Measure before you start.** Time the task for two weeks now, so you can prove the saving later.
- [ ] **Check the data side.** Before customer or staff data goes into any AI tool, check how UK GDPR or your local data rules apply.

Worked example

Example only. This is a fictional business with invented, illustrative round numbers. Use your own figures.

The business: a 120-person firm with a customer service team of eight. The team answers about 3,000 customer emails a month. The plan: use AI to draft first responses, with a person checking and sending every reply.

Loaded hourly cost: a salary of £40,000 plus employer costs and overheads comes to about £54,000 a year. Divided by about 1,800 working hours, that gives **£30 an hour**.

Block 1: Costs

One-off item	£
Set-up	3,000
Integration with the email system	4,000
Training for the team	1,500
Internal time (50 hours at £30)	1,500
Total one-off cost	**10,000**

Ongoing item	£ per month
Licences	400
Usage	150
Support	150
Review time (20 hours at £30)	600
Total ongoing cost per month	**1,300**

Block 2: Benefits

Benefit	Workings	£ per month
Hours saved	3,000 emails x 2 minutes saved = 6,000 minutes = 100 hours. 100 x £30	3,000
Less rework	10 fewer hours fixing wrong or incomplete replies. 10 x £30	300
Extra revenue or faster cash	Not measurable yet, so left out	0
Total monthly benefit		**3,300**

Where the time goes: the team uses the 100 freed hours to clear a backlog of callback requests. That is why the saving counts.

Block 3: Results

Result	Workings	Answer
Net monthly benefit	£3,300 minus £1,300	**£2,000**
Payback	£10,000 divided by £2,000	**5 months**
First-year return	(12 x £2,000 = £24,000, minus £10,000 = £14,000) divided by £10,000	**140%**

Low case

The team saves 70 hours a month instead of 100, and rework drops by less than hoped. Total benefit falls by about a third, from £3,300 to £2,300.

	Best estimate	Low case
Hours saved	£3,000 (100 hours)	£2,100 (70 hours)
Less rework	£300	£200
Total monthly benefit	£3,300	£2,300
Total ongoing cost per month	£1,300	£1,300
Net monthly benefit	£2,000	£1,000
Payback	5 months	10 months
First-year return	140%	20%

What to tell your finance director: on our best estimate this pays back in five months. On the low case it still pays back within the first year. We will time the task for two weeks before launch and report the real figures at month three.

Want help running this?

This worksheet gives you the numbers. The harder part is picking the right use case, getting honest figures out of the team, and making the saving real once it goes live.

That is the work I do with leadership teams at UK and GCC businesses with 50 to 200 staff.

Book a 30-minute call at imrananwar.ai

We will look at your use case together and pressure-test the numbers before you commit.

Imran Anwar
AI strategy from someone who builds it.
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