

Appendix C: AI Opportunity Scorecard

Use this scorecard to rate processes from your Appendix B inventory with the AI Opportunity Score from Chapter 4, and to score any new candidate against your queue later. It holds the factor and evidence grids for Worksheet 4.1 and a re-score log for Chapter 7.

Step 1: Remove the decisions

Do not score a consequential human decision. List it for Chapter 5 and score the work around it.

Table 1: Decisions Removed Before Scoring.

Inventory row	Decision removed for Chapter 5	Work to score instead
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Step 2: The factor guide

Score each factor from 1 to 5. The guide defines 1, 3, and 5; 2 and 4 fall between.

Table 2: The AI Opportunity Score Factor Guide (from Table 4.2).

Factor	Half	Question	1	3	5
Repetition	Value	How often?	Under once a month	5 to 19 a month	60 or more a month
Time	Value	Effort each time?	Under 5 minutes	21 to 40 minutes	An hour or more
Cost	Value	Hours a month; cost of delay?	Under 8 hours	40 to 79 hours	160 or more, or delay costs sales
Impact	Value	Who notices improvement?	Only the team	Managers, other teams	Customers, compliance, or decisions
Feasibility	Readiness	Can today's AI do it reliably?	Only in demos	Most cases, with checking	Routinely, in tools available now
Data readiness	Readiness	Inputs available, clean, permitted?	Scattered or restricted	Most cases; known gaps	Structured, current, approved
Risk (counts against)	Readiness	If AI is wrong, with your controls?	Minor, easy to catch	Noticeable, caught in routine check	Serious, hard to detect

Scoring rules:

- Score alone first, then compare; discuss only gaps of two or more.
- Write the evidence behind every 4 and 5, with its source.
- Judge feasibility on your own data, not a vendor's demo.
- Score risk with the controls you will actually run, written beside the score. If a planned control is missing when work starts, the risk score goes back up.
- Skip weights in a first pass. When torn, pick the lower number.

Step 3: Score one process with evidence

Copy this grid for each process.

Process: _____ Scorer: _____ Date: _____

Table 3: Evidence Grid for One Process.

Factor	My score (alone)	Agreed score	Evidence and source (required for 4 or 5)
Repetition			
Time			
Cost			
Impact			
Value total (4 to 20)			
Feasibility			
Data readiness			
Risk			Controls in place or planned:
6 - risk			
Readiness total (3 to 15)			
AI Opportunity Score (7 to 35)			

- **Value total** = repetition + time + cost + impact
- **Readiness total** = feasibility + data readiness + (6 - risk)
- **AI Opportunity Score** = value total + readiness total

Step 4: Place it in a category

Table 4: Category from the Two Halves.

Value total	Readiness 9 or more	Readiness below 9
12 or more	Quick win	Strategic foundation
Below 12	Watchlist	Do-not-automate

The quick-win gate overrides the table: a process with a risk of 5, or with data it is not permitted to use, is never a quick win. With high value it becomes a strategic foundation, with the missing control as groundwork; otherwise it is do-not-automate. Move across a line only with evidence. Within a category the total orders the work; two points apart is a tie.

Step 5: Your portfolio

Table 5: AI Opportunity Portfolio.

Process	Value total	Readiness total	Score (of 35)	Category	Owner	Next step
<i>Example (illustrative): client document intake</i>	<i>13</i>	<i>8</i>	<i>21</i>	<i>Strategic foundation</i>	<i>Office manager</i>	<i>Groundwork: one intake channel and an approved tool for client data</i>

A healthy first portfolio usually holds two or three quick-win candidates, one or two strategic foundations with named groundwork, and everything else parked with a re-score date. To order the shortlist, take lowest risk first, then most people involved.

Re-score log (Chapter 7 and later)

Keep the factor guide unchanged. Change a factor only when a baseline or other evidence gives a reason, and record why.

Table 6: Re-Score Log.

Process	Factor	From	To	Evidence for the change	New score	Date

Scoring a new candidate against the queue

- ☐ Add it to the Appendix B inventory with an owner.
- ☐ Remove any consequential decision first (Step 1).
- ☐ Score it on the factor guide with evidence, alone and then together.
- ☐ Place it in a category and apply the quick-win gate.
- ☐ Compare its total only with others in the same category.
- ☐ Give it an owner, a next step, and a date, even if the next step is “do nothing”