
READ THE EXAMPLE

Problem-First AI Worksheet

Give AI a clear job before giving it a subscription.

Choose one recurring task, find what holds it up, then decide what to test. Use pages 2 and 3 to work through your own business.

A worked example: invoices going out late

Fictional service business. All numbers below are illustrative.

THE TASK + BOTTLENECK	Invoices wait because completed-job details arrive in scattered messages.
THE BASELINE	10 invoices a week at 20 minutes each, including chasing and checking. That is 200 minutes a week.
THE FIRST CHANGE	Use one job-completion form. Measure whether that solves the delay before adding AI.
A POSSIBLE AI TRIAL	From complete notes, draft an invoice description. Start with dummy data. A person checks every draft against the job record.
THE TEST TARGET	Aim for 12 minutes per invoice, including review, with no increase in errors. Across 10 invoices, that would save 80 minutes a week.
THE DECISION	Compare similar work with and without AI after the process change. Count setup time and tool costs. Keep, adjust or stop based on the result.

Time saved creates capacity; it is not automatically a cash saving.

Further reading: business.gov.au, Artificial intelligence (AI).

YOUR WORKSHEET / UNDERSTAND THE PROBLEM

Start with the work.

Pick one task. Use actual observations where you can; label estimates.

Business / team: _____ Date: _____

01 Name the recurring task.

What work keeps slowing you down? Be specific.

02 Find the exact point where it gets stuck.

What is missing, repeated or waiting for someone?

03 Record how often it happens.

Count tasks or occurrences over a typical week.

04 Measure the effect on the business.

Time spent, corrections, delayed invoices or missed follow-ups.

05 Check whether the process needs changing.

Could a clearer handover or an existing feature solve it?

YOUR WORKSHEET / PLAN A SMALL TEST

Make the trial measurable.

A process change or existing software may be enough. Choose what fits.

06 Give AI one specific job, if useful.

Describe the input, output and limits. It is fine to choose no AI.

07 Choose the information you can use.

Start with dummy examples. Check tool approval before using real data.

08 Name the person who checks the work.

What will they verify before anything is sent or changed?

09 Set a result that would make the trial worthwhile.

Include review time, accuracy and setup or subscription costs.

10 Choose a small trial and a review date.

Say what you will test, for how long, and when you will decide.

At the review: keep / adjust / stop. Record what the trial actually showed.