

The AI-to-Margin Diagnostic

Find where AI value is leaking before approving further investment.

Use this worksheet to test whether an AI initiative has a credible financial case, whether the delivery model can capture the benefit, and what leadership should do next.

AI INITIATIVE NAME

ASSESSMENT DATE

INITIATIVE OWNER

FINANCIAL OWNER

REVIEW DATE

1. Where is value most likely to be leaking?

☐

Selection

The initiative targets an easy or visible task rather than a material cost or revenue driver.

☐

Workflow

One step is faster, but the end-to-end process remains constrained by other hand-offs, approvals or queues.

☐

Capture

Time has been saved, but it has not been converted into lower cost, greater capacity or additional revenue.

☐

Governance

Poor controls or limited trust mean people repeatedly check or redo the AI-assisted work.

PRIMARY LEAK SUSPECTED

OPTIONAL NOTES

Select one

2. Test the initiative

Questions 1-3: Value case

CONFIDENCE SCALE

1 = No evidence or confidence 2 = Weak 3 = Partially established 4 = Strong 5 = Measured and evidenced

1. DRIVER

Which specific cost line or revenue stream is this initiative meant to move, and by how much?

CONFIDENCE

1

2

3

4

5

SHORT ANSWER

EVIDENCE / NOTES

2. BASELINE

What is the current measured performance of that line, in pounds, hours, volume or another relevant unit?

CONFIDENCE

1

2

3

4

5

SHORT ANSWER

EVIDENCE / NOTES

3. OWNER

Who is personally accountable for the financial result, not only the technology rollout?

CONFIDENCE

1

2

3

4

5

SHORT ANSWER

EVIDENCE / NOTES

2. Test the initiative

Questions 4-7: Value delivery

4. PROCESS

Has the full end-to-end process been mapped, and is the AI-enabled step genuinely the binding constraint?

CONFIDENCE

1 2 3 4 5

SHORT ANSWER

EVIDENCE / NOTES

5. CAPTURE

What is the explicit plan for banking the benefit through reduced cost, redeployed capacity or additional volume?

CONFIDENCE

1 2 3 4 5

SHORT ANSWER

EVIDENCE / NOTES

6. TRUST

What controls, data standards and review processes make the output reliable enough to use without unnecessary rechecking?

CONFIDENCE

1 2 3 4 5

SHORT ANSWER

EVIDENCE / NOTES

7. PROOF

When and how will the result be visible in the P&L, and what action will be taken if the benefit does not appear?

CONFIDENCE

1 2 3 4 5

SHORT ANSWER

EVIDENCE / NOTES

3. Interpret the result

STOP AND REASSESS

If any of Questions 1 to 3 cannot be answered clearly, do not approve further investment until the value case has been rebuilt.

FIX THE DELIVERY MODEL

If Questions 1 to 3 are clear but one or more of Questions 4 to 7 are weak, the initiative may have a fixable operating-model or delivery problem.

PROCEED WITH EVIDENCE

If all seven questions are supported by clear evidence, proceed with defined ownership, measurement and a scheduled P&L review.

4. Define the next move

THE ONE CHANGE MOST LIKELY TO IMPROVE FINANCIAL IMPACT

DECISION

Stop Continue
Redesign Scale

ACTION OWNER

COMPLETION DATE

DATE RESULT WILL BE REVIEWED

TARGET FINANCIAL IMPACT

P&L MEASURE THAT SHOULD MOVE

WHAT WILL WE STOP DOING IF THE EXPECTED BENEFIT DOES NOT APPEAR?