AI Value Evidence Worksheet

How to use this worksheet:

Complete one worksheet for one workflow and one evaluation period. Keep the supporting evidence for each entry with the responsible owner and note where that evidence is stored. If an entry cannot be supported, record it as "not yet evidenced" rather than estimating. The gaps are the point: they show where a value claim is ahead of its support.

Workflow evaluated

Evaluation period

Completed by

Date completed

1. Purpose and Owner

Define what the business is trying to improve before measuring anything. Released time is a means, not an outcome.

Question	Response	Supporting Evidence / Location
What is the purpose of this assessment and the business decision it supports?		
Who is the process owner accountable for completing and maintaining this assessment?		
Which departments, systems, or entities are within the scope of the review?		
What are the key objectives and expected outcomes for this assessment cycle?		

2. Baseline and Comparison

Compare similar workloads before and after implementation. Record anything that could make the two periods less comparable.

Measure	Baseline Period	AI-Enabled Period	Notes on Comparability
Transaction or case volume			
Complexity of work (mix, exceptions, special cases)			
Elapsed time / turnaround			
Staff effort (hours)			
Error and correction rates			
Backlog or other outcome measure			
Staffing changes			
Adoption and usage (consistent or selective?)			
Other technology or workflow			

3. Net Capacity

Show gross time released, then subtract the additional effort the new workflow requires. Include preparation, AI processing, human review, exception handling, corrections, and ongoing oversight.

Line	Hours per Period	Source / Method
A. Baseline effort for the task		
B. AI-enabled effort for the task		
C. Gross time released (A − B)		
D. Incremental human review		
E. Incremental correction and rework		
F. Incremental support, monitoring, and oversight		
G. Net capacity released (C − D − E − F)		

Measurement method: **Describe how hours were captured (time records, system logs, sampling, self-report) and the period covered.**

4. Quality and Controls

A faster process has not improved until quality is confirmed. Record results and open items.

Item	Result	Evidence / Reviewer
Missed exceptions (items the process should have caught)		
False flags (items flagged in error)		
Review evidence (what was reviewed, by whom, how often)		
Operating boundaries (approved uses, data, and limits on use)		
Unresolved issues		
Quality compared with baseline (better, same, worse)		

5. Value Realized

Describe how the released capacity was actually used. Then sort each benefit into one category below, with its own evidence, assumptions, and time frame. Do not count the same hours twice.

How was the net capacity used?

Category	Benefit Claimed	Amount or Measure	Evidence and Assumptions	Time Frame
Demonstrated cash effect (reduced overtime, avoided outside support, hire already avoided)				
Capacity benefit (backlog reduced, faster close, added volume, wider review coverage)				
Quality benefit (fewer errors, better coverage)				
Forecast benefit (anticipated, not yet occurred)				

Double-count check: Confirm that no block of hours appears in more than one category above.

6. Total Cost and Decision

Include the costs of operating the process, including human review and control activities. Note how costs may change if the use case expands.

Cost Table

Cost Category	Amount for Period	Notes (Including Expected Change at Scale)
Licenses and usage charges		
Integration and implementation		
Training		
Monitoring and support		
Human review and control activities		
Other		
Total Cost		

Decision Table

Decision Item	Response
What the evidence does and does not demonstrate	
Evidence limitations	
Management's next decision (Scale / Adjust / Collect More Evidence / Stop)	
Rationale	
Action Owner(s)	
What Would Trigger an Earlier Review	
Review Date	

MGO

MGO helps organizations evaluate AI use cases, establish practical measures, assess controls, and connect technology investments to measurable business outcomes.

Contact us to discuss how to evaluate your AI investments.