

AI Use Case Picker

Choose the first AI workflow to implement in your business.

Use this worksheet to decide where AI should help first. The best first use case is useful, repeated often, low-risk, and easy to review.

Score your possible AI use cases

Rate each idea from 1 to 5. Higher value and frequency are good. Lower risk and lower effort are better. Start with a use case that is useful and easy to review.

Use case idea	Value 1-5	Frequency 1-5	Risk 1-5	Effort 1-5	Start?
Customer replies or FAQs					
Sales follow-up messages					
Quote or proposal drafts					
Blog or social content drafts					
Meeting or call summaries					
SOP or process documentation					
Chatbot planning or scripts					
Product/service descriptions					
Internal research summaries					
Other: _____					

Choose your first use case

Write your top three candidates below. Then choose the one that has the best balance of usefulness, frequency, reviewability, and ease.

Rank	Use case	Why this is a good first test
1		
2		
3		

Good first AI use cases by category

Category	Examples
Customer support	Draft FAQ answers, reply to common questions, summarize customer issues, write escalation notes.
Sales	Draft follow-up emails, qualify leads, summarize call notes, create objection-handling scripts.
Marketing	Create first drafts, repurpose content, brainstorm hooks, summarize audience pain points.
Operations	Draft SOPs, summarize policies, turn processes into checklists, create training notes.
Admin	Summarize meetings, draft internal messages, organize notes, create task lists.
Hiring/training	Draft onboarding checklists, create training outlines, write role expectations, prepare interview questions.

Avoid as first use cases

- High-risk decisions that require legal, tax, medical, financial, or compliance expertise.
- Tasks that involve sensitive information unless you have the right permissions and privacy controls.
- Customer-facing automation with no human review or escalation path.
- Large, complex workflows before you have tested simple prompts and review rules.

Best first move: choose one use case, create one prompt, test it on real examples, and improve it before adding more AI tools.