CASE STUDY — AI STRATEGY & USE CASE DESIGN

Building the AI Use Case Library: How to Invest in the Right AI

How SaaS Business Advisors helps organizations cut through AI hype — using a structured intake process and scoring framework to identify, evaluate, and prioritize the AI use cases that deliver real business outcomes.

THE PROBLEM WITH HOW COMPANIES INVEST IN AI

Most organizations are generating AI ideas faster than they can evaluate them. Every team has a list. Every vendor has a pitch. And without a structured way to assess which ideas are worth pursuing, companies end up investing in the wrong use cases — ones that are technically interesting but strategically thin, or that require far more complexity than the business is ready for.

The result is wasted budget, frustrated teams, and a growing skepticism about whether AI can actually deliver on its promise. The problem isn't the technology. It's the process for deciding where to apply for it.

SaaS Business Advisors built a solution to this problem: a structured, repeatable AI Use Case Intake Process that helps organizations move from a scattered list of ideas to a prioritized, fundable roadmap — anchored in business outcomes, not technology potential.

WHAT WE BUILT

The AI Use Case Intake Process is a facilitated workshop methodology and evaluation framework that any organization can use to systematically discover, document, score, and sequence their AI investments. It is designed to be cross-functional by default — bringing together business leaders, operations, IT, data, and customer-facing teams to ensure that every use case is evaluated from all the angles that matter.

> ***"The best AI investments aren't made by the teams with the most ideas. They're made by organizations that have a disciplined process for telling the good ideas from the great ones."***

The framework has five core objectives: standardize how business process details are captured for AI agent design; identify the key actors, inputs, and outputs that map clear automation

opportunities; prioritize use cases based on frequency, impact, and ROI; create a repeatable intake process that scales across departments; and ensure every AI agent design aligns with business goals, compliance requirements, and risk boundaries.

THE WORKSHOP FRAMEWORK

The intake process is delivered as a structured 3–4 hour workshop, organized into four phases. Before the session begins, SaaS Business Advisors conducts pre-workshop preparation: aligning stakeholders on objectives, selecting cross-functional participants, sharing primer materials on AI trends, and collecting a baseline survey on current pain points and AI usage. This groundwork ensures the workshop itself is focused and productive from the first minute.

01	02	03	04
Kickoff & Context	**Discovery**	**Ideation**	**Prioritization**
30–45 min	**45–60 min**	**60–75 min**	**45–60 min**
AI landscape overview, inspiration cases, and alignment on objectives.	Pain point mapping and prioritization using guided prompts and visual tools. Focusing on the **"Jobs to be done."**	Cross-functional use case brainstorming using the Use Case template.	Scoring, shortlisting 3–5 use cases, and drafting the implementation roadmap.

THE USE CASE CANVAS: SEVEN DESIGN PILLARS

At the heart of the intake process is the Use Case Canvas — a structured template that captures everything needed to evaluate whether an AI agent is the right solution for a given business problem. Each canvas is built around seven design pillars, moving from strategic context through to prioritization and next steps.

Strategic Landscape
Where the process sits, why it matters strategically, and what pain points exist today.

Roles & Systems
People, roles, and tools involved — mapping human-in-the-loop vs. agentic behavior.

Automation Potential
Single vs. multi-agent design, collaboration points, and where humans must stay in the loop.

Agent Impact Score
Frequency and impact rating that determines whether to act now or plan for later.

Workflow Blueprint
Step-by-step process breakdown including triggers, decision rules, and current workflow logic.

Inputs & Outputs
What data or triggers start the process and what the agent is expected to produce.

Future-State Vision
What success looks like if automated, and the ROI — revenue, productivity, cost reduction.

By working through all seven pillars for each candidate use case, teams develop a complete, documented picture of what the agent would do, who it would serve, what systems it would touch, and what value it would generate. This becomes the source of truth for prioritization, design, and business case development.

THE SCORING FRAMEWORK

Once use cases are documented, SaaS Business Advisors facilitates a structured scoring exercise. Each use case is rated on dimensions including business impact, feasibility, system integration complexity, business process complexity, time to value, resource intensity, and risk. The scores are plotted on a two-by-two matrix that produces a clear visual picture of where to focus first.

Quadrant	What it means & what to do
Quick Wins	High impact, high feasibility. Start here — these deliver the fastest ROI with the least risk.
Strategic Bets	High impact, lower feasibility. Worth investing in with proper planning and phased execution.
Incremental Improvements	Lower impact, high feasibility. Good candidates for future phases once foundations are in place.
Low Priority	Low impact, low feasibility. Defer or deprioritize until the landscape changes.

The scoring framework removes the politics from prioritization. Instead of the loudest voice in the room determining the roadmap, decisions are grounded in data. Teams walk out of the workshop with a shortlist of three to five use cases that the entire organization has aligned on — and a clear rationale for why each one made the cut.

THE IMPLEMENTATION ROADMAP

The final output of the workshop is a sequenced implementation roadmap that organizes approved use cases into three time horizons. This gives leadership a realistic, phased view of the AI journey — from quick wins that demonstrate value fast, to strategic builds that require more infrastructure, to advanced orchestration that represents the long-term vision.

3–6 Months
Quick Wins

- Basic process automation (read/write)
- Single-step workflows
- Single call / data summarization

6–18 Months
Strategic Builds

- Batch & complex process automation
- Single to multi-step workflows
- Multi-call / data summarization
- Software automation requests

18+ Months
Advanced Orchestration

- Advanced multi-read/write automation
- Multi-step / multi-system workflows
- Full enterprise orchestration

WHAT GETS DELIVERED

Every engagement produces three concrete deliverables that give the organization everything it needs to move from workshop to execution.

01
Workshop Report
Prioritized use cases with potential ROI, risk assessment, and clearly defined next steps..

02
Executive Summary Deck
High-level outcomes, implementation roadmap, and ROI analysis ready for leadership presentation.

03
Action Plan
Named owners assigned for discovery, pilot development, and business case execution.

WHY THIS APPROACH WORKS

The intake process works because it anchors every conversation in business outcomes, not technology. Teams don't walk in asking "what can AI do?" they walk in asking "what problems do we need to solve, and what would it be worth to solve them?" That simple reframe changes everything.

It also works because it is cross-functional by design. AI programs fail when they are owned by IT alone or business alone. The intake process deliberately brings both sides of the table together, ensuring that the use cases that get prioritized are ones that the people who will live with the outcomes have genuinely bought into.

And it works because it is repeatable. Once an organization runs the process once, the framework becomes a shared language for evaluating AI opportunities across every team, every quarter, at any scale.

THE TAKEAWAY

The organizations that win with AI aren't the ones that move fastest. They're the ones that invest most deliberately. SaaS Business Advisors built the AI Use Case Intake Process to give clients a structured, defensible, outcome-driven way to make those investment decisions — and to build the internal capability to keep making them well as the technology evolves. Before you build a single agent, you need to know exactly which problem it's solving, what success looks like, and whether it's the best use of your investment. That's what this process delivers.

AI Use Case Design · **Intake Framework** · **AI Prioritization** · **Use Case Library** · **Multi-Agent** · **AI Strategy** · **ROI Analysis** · **Change Management**