

The AI Opportunity Canvas

A one-workflow canvas for choosing a useful, bounded next step.

Use with your team / Notes and evidence

The task

The people involved

The process owner

The decision we need to make

01 Define the actual task

Describe the task in one sentence. What starts it, what finishes it, and who uses the result?

02 Find the friction

Where does time or attention go today? Include checking, copying, waiting, corrections and exceptions.

03 Map the information

What sources are needed? Are they accessible, current and approved for the intended use? Who owns them?

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04 Describe a useful result

What would improve, and how would you recognise it? Keep the outcome separate from the features of a possible tool.

05 Set the boundaries

Which decisions stay with a person? What must not be automated? Consider a simpler process or conventional automation too.

06 Choose a small next step

Name the owner, the test, the evidence required and the date for a decision. What would make you continue, revise or stop?

The next decision.

A useful opportunity has a real task, a responsible owner and a way to test the difference. It does not need to sound impressive.

Action / Owner / Review date

A discussion aid, not a certification, professional opinion or promise of results. A readable web version accompanies this worksheet.