ActiveHub

AI Opportunity Assessment

ILLUSTRATIVE EXAMPLE

12-person professional services business

Not client work

Example of how ActiveHub assesses and prioritises potential AI opportunities for a small business.

EXECUTIVE RECOMMENDATION

AI Opportunity Assessment

BUSINESS PROFILE	12-person professional services business
PURPOSE	Identify which AI opportunities deserve attention, which require further investigation, and which should not be prioritised.
STATUS	**Illustrative example — not client work**

Where should this business focus?

The assessment identified several areas where AI could potentially reduce administrative effort, improve access to existing information or accelerate routine work.

The recommendation is **not** to launch a broad AI programme.

Three opportunities justify action now.

One deserves further investigation.

One should be deferred until underlying information improves.

Three should **not** be prioritised at this stage.

OPPORTUNITY	RECOMMENDATION	REASON
First drafts of routine client documents	→ PURSUE NOW	Repetitive work, existing source material and straightforward human review
Internal knowledge search	→ PURSUE NOW	Useful information already exists but is time-consuming to locate
Meeting notes and action extraction	→ PURSUE NOW	Defined administrative task with clear human oversight
Client-enquiry triage	INVESTIGATE FURTHER	Potential value, but escalation rules and reliability need testing
Management reporting assistance	DEFER	Potentially useful, but current source information is inconsistent
Fully automated client advice	× DO NOT PURSUE	High judgement requirement and disproportionate reliability risk
Replace core business software with an AI platform	= NO CURRENT CASE FOR CHANGE	No demonstrated business case for replacing existing systems
Custom AI application	॥ DO NOT PURSUE NOW	Existing tools should be tested before custom investment is considered

IMMEDIATE RECOMMENDATION

Start with **two controlled uses**:

1. first-draft assistance for routine documents; and
2. internal knowledge retrieval.

Meeting-note assistance can be introduced as a third low-complexity use if an appropriate tool is already available within the business's existing software.

Define acceptable information handling and human-review rules before wider use.

Do not commit to custom AI development, replace core systems or automate client-facing professional judgement at this stage.

Business context

This illustrative business has 12 employees providing professional services to business clients.

Its work includes:

- responding to new enquiries;
- preparing proposals and quotations;
- producing recurring client documents;
- holding client and internal meetings;
- researching and retrieving information;
- maintaining internal knowledge;
- producing management information; and
- carrying out routine administrative communication.

The business already uses standard cloud software for email, documents and day-to-day operations.

There is no dedicated internal AI or technology-strategy role.

Business objectives

Management is interested in AI primarily because it may help to:

- reduce repetitive administrative work;
- reduce time spent producing routine first drafts;
- make existing knowledge easier to find;
- improve consistency;
- avoid unnecessary hiring as the business grows; and
- make better use of software already being paid for.

Management does **not** want to:

- introduce unnecessary subscriptions;
- expose confidential client information without appropriate controls;
- replace useful existing systems without a business case;
- create a large technology project; or
- remove human judgement from client-facing work.

Current constraints

The assessment identified several practical constraints:

- management time is limited;
- processes are only partly documented;
- information is spread across email, documents and existing systems;
- document quality varies between employees;
- some work involves confidential client information;
- there is no internal AI specialist; and
- the value of AI has not yet been demonstrated in this business.

ASSESSMENT QUESTION

Where could AI create useful business value without introducing disproportionate cost, complexity or risk?

Opportunity landscape

Client work

Routine document drafting

BUSINESS PROBLEM

Employees repeatedly create similar first drafts using existing templates, previous examples and client information.

POSSIBLE AI ROLE

Prepare structured first drafts for human review.

POTENTIAL BENEFIT

Reduce repetitive drafting effort and improve consistency.

MAIN DEPENDENCY

Reliable source material and mandatory human review.

Meeting summaries and action extraction

BUSINESS PROBLEM

Employees spend time converting meeting notes into summaries, actions and follow-up messages.

POSSIBLE AI ROLE

Produce draft summaries and action lists.

POTENTIAL BENEFIT

Reduce administrative follow-up.

MAIN DEPENDENCY

Appropriate handling of meeting content and verification of the output.

Research assistance

BUSINESS PROBLEM

Some assignments require employees to review multiple information sources before beginning work.

POSSIBLE AI ROLE

Assist with initial synthesis and question development.

POTENTIAL BENEFIT

Accelerate early-stage research.

MAIN DEPENDENCY

Source verification remains necessary.

Automated client advice

BUSINESS PROBLEM

Producing client recommendations requires experienced staff time.

POSSIBLE AI ROLE

Generate client-facing answers or recommendations automatically.

POTENTIAL BENEFIT

Potentially significant time reduction.

MAIN DEPENDENCY

Professional judgement, reliability, liability and contextual understanding.

INITIAL VIEW

Potential benefit does not justify the current risk.

Internal operations

Internal knowledge search

BUSINESS PROBLEM
Useful procedures, prior examples and internal information exist but are difficult to locate consistently.

POSSIBLE AI ROLE
Help employees find and summarise approved internal information.

POTENTIAL BENEFIT
Reduce search time and repeated questions.

MAIN DEPENDENCY
Information quality, permissions and defined source material.

Internal procedure Q&A

BUSINESS PROBLEM
Employees repeatedly ask similar operational questions.

POSSIBLE AI ROLE
Answer questions using approved internal procedures.

POTENTIAL BENEFIT
Easier access to routine internal guidance.

MAIN DEPENDENCY
Procedures need to be sufficiently complete and current.

Management reporting assistance

BUSINESS PROBLEM
Preparing recurring reports involves manual consolidation and commentary.

POSSIBLE AI ROLE
Assist with summarising and explaining existing reporting data.

POTENTIAL BENEFIT
Reduce preparation effort.

MAIN DEPENDENCY
Underlying reporting information is currently inconsistent.

Administrative email drafting

BUSINESS PROBLEM
Employees spend time writing routine administrative messages.

POSSIBLE AI ROLE
Generate first drafts.

POTENTIAL BENEFIT
Small but frequent efficiency gain.

MAIN DEPENDENCY
Limited; human review remains straightforward.

Sales and enquiries

Enquiry classification

BUSINESS PROBLEM
Incoming enquiries vary considerably in relevance and urgency.

POSSIBLE AI ROLE
Categorise enquiries and suggest routing.

POTENTIAL BENEFIT
Faster initial handling.

MAIN DEPENDENCY
Clear escalation rules and reliable handling of unusual enquiries.

Proposal drafting

BUSINESS PROBLEM
Proposals contain repeated structural and descriptive content.

POSSIBLE AI ROLE
Generate a first draft using approved templates and inputs.

POTENTIAL BENEFIT
Faster initial preparation.

MAIN DEPENDENCY
Strong templates and human commercial review.

Follow-up preparation

BUSINESS PROBLEM
Follow-up after enquiries and meetings is inconsistent.

POSSIBLE AI ROLE
Prepare draft follow-up messages and action reminders.

POTENTIAL BENEFIT
Improve consistency and reduce routine writing.

MAIN DEPENDENCY
Appropriate review before external communication.

Prioritisation

> **The ratings are decision aids, not claims of mathematical precision.**

Positions are indicative and follow the ratings in the table. Hollow marker: business value rated unclear. Risk is shown in the table, not on the matrix.

Assessment criteria

Each opportunity was assessed qualitatively against:

- business value;
- frequency of use;
- administrative burden addressed;
- practical feasibility;
- quality of existing information;
- ease of human review;
- privacy and confidentiality considerations;
- reliability risk;
- technology dependency;
- cost and complexity; and
- reversibility if the approach proves unsuccessful.

OPPORTUNITY	BUSINESS VALUE	FEASIBILITY	RISK	PRIORITY
Routine document drafting	High	High	Medium	**Prioritise**
Internal knowledge search	High	Medium–High	Medium	**Prioritise**
Meeting notes/actions	Medium	High	Low–Medium	**Prioritise**
Administrative email drafting	Medium	High	Low	Consider within existing tools
Proposal drafting	Medium–High	Medium	Medium	Test selectively
Enquiry classification	Medium	Medium	Medium	Investigate
Internal procedure Q&A	Medium	Medium	Medium	Investigate after information cleanup
Management reporting	Medium–High	Low–Medium	Medium	Defer until data improves
Research assistance	Medium	High	Medium	Allow selectively with verification
Automated client advice	Potentially high	Low	High	**Do not pursue**
Custom AI application	Unclear	Low	Medium–High	**Do not pursue now**
Core-system replacement	Unclear	Low	High disruption	**No current case for change**

Priority interpretation

PRIORITISE

The opportunity addresses a real business problem, can be controlled and can be tested without creating a large dependency.

TEST SELECTIVELY

The opportunity may be useful, but evidence is needed before wider adoption.

INVESTIGATE LATER

The potential benefit is currently constrained by process, information or system quality.

DO NOT PRIORITISE

There is insufficient business justification or the current risk, cost or complexity outweighs the likely value.

Detailed assessment of priority opportunities

OPPORTUNITY 1

Routine document drafting

CURRENT PROBLEM

Employees repeatedly produce similar first drafts using:

- existing templates;
- previous examples;
- standard wording;
- client-provided information; and
- internal knowledge.

The activity requires staff judgement, but part of the initial drafting work is repetitive.

POTENTIAL AI ROLE

Use an approved AI capability to create a structured first draft from defined inputs and approved source material.

POTENTIAL VALUE

- reduce blank-page drafting effort;
- improve initial consistency;
- make approved structure easier to follow;
- allow experienced employees to spend more time reviewing substance rather than recreating standard text.

DEPENDENCIES

Before testing:

- identify appropriate document types;
- confirm approved source material;
- define which information may be entered into the tool;
- establish a review requirement; and
- avoid document types where errors would create disproportionate consequences.

PRINCIPAL RISKS

- invented or inaccurate content;
- inappropriate use of confidential information;
- incorrect reuse of previous material;
- employees treating generated text as final;
- loss of context when prompts are incomplete.

HUMAN CONTROL

Every document intended for external use remains subject to responsible human review.

The employee remains accountable for the final content.

RECOMMENDATION

→ PURSUE NOW **Through a limited, controlled pilot using an existing approved tool.**

Do not commission custom development for this use case.

OPPORTUNITY 2

Internal knowledge search

CURRENT PROBLEM

Useful information already exists across:

- shared documents;
- internal procedures;
- previous work;
- email;
- templates; and
- individual employee knowledge.

Employees can often find the information eventually, but retrieval is inconsistent and sometimes depends on knowing who to ask.

POTENTIAL AI ROLE

Provide a more natural way to search or summarise approved internal information.

POTENTIAL VALUE

- reduce time spent searching;
- reduce repeated internal questions;
- improve access to existing knowledge;
- make procedures and prior examples easier to use.

DEPENDENCIES

The main constraint is not AI capability.

The business first needs to determine:

- which information should be searchable;
- which sources are authoritative;
- what is outdated;
- who should have access; and
- whether existing software already provides adequate search or AI capability.

PRINCIPAL RISKS

- returning outdated information;
- mixing authoritative and informal sources;
- exposing information to employees who should not see it;
- generating confident answers where the source material is incomplete.

HUMAN CONTROL

Employees should be able to inspect or verify the source information behind important answers.

RECOMMENDATION

→ PURSUE NOW

Beginning with information cleanup and evaluation of capabilities already available in existing software.

Do not buy a specialist knowledge platform until existing options have been assessed.

OPPORTUNITY 3

Meeting notes and action extraction

CURRENT PROBLEM

Employees spend time after meetings:

- organising notes;
- writing summaries;
- identifying actions;
- drafting follow-up communication.

POTENTIAL AI ROLE

Prepare draft summaries, actions and follow-up material from meeting notes or transcripts where appropriate.

POTENTIAL VALUE

- reduce routine administration;
- improve consistency of follow-up;
- reduce forgotten actions.

DEPENDENCIES

- appropriate meeting-information handling;
- participant/privacy considerations where recording or transcription is involved;
- clear human review.

PRINCIPAL RISKS

- incorrectly attributing actions;
- omitting important nuance;
- inaccurate summaries;
- inappropriate processing of sensitive discussions.

HUMAN CONTROL

The person responsible for the meeting reviews the output before it becomes an agreed record or external communication.

RECOMMENDATION

→ PURSUE NOW **Where an appropriate capability already exists in approved software.**

Avoid introducing another standalone subscription unless existing tools are inadequate.

What we would not recommend

Fully automated client advice

✕ DO NOT PURSUE

WHY

Client advice depends on:

- business context;
- professional judgement;
- incomplete information;
- consequences that may not be obvious from the immediate question; and
- responsibility for the final recommendation.

Although AI may assist employees with research or first drafts, moving directly to automated client advice would create disproportionate reliability and accountability risk.

Human review would remain essential, reducing much of the claimed automation benefit.

Custom AI application

II DO NOT PURSUE NOW

WHY

No requirement has been identified that clearly justifies custom development.

Before custom investment is considered, the business should establish:

1. that the underlying business problem is valuable enough to solve;
2. that existing software cannot address it adequately;
3. that a limited pilot demonstrates real value; and
4. that the expected benefit justifies ongoing technical dependency and maintenance.

At present, those conditions have not been demonstrated.

Replace existing core software with an AI platform

= NO CURRENT CASE FOR CHANGE

WHY

Several identified problems appear to relate to:

- inconsistent processes;
- fragmented information;
- incomplete use of existing software; and
- lack of clear working rules.

Replacing a core system would introduce:

- migration effort;
- employee disruption;
- new dependencies;
- additional subscription cost; and
- implementation risk.

There is currently no evidence that replacing the underlying software is necessary to achieve the most valuable improvements.

Management reporting automation

DEFER

WHY

There is useful potential, but AI will not correct inconsistent source information.

Improving the quality and consistency of the underlying reporting inputs should come first.

Automating poor inputs would make the reporting process faster without necessarily making the resulting information more reliable.

Recommended next actions

Now

1. Select two controlled use cases

Start with:

- routine document drafting; and
- internal knowledge retrieval.

Meeting-note assistance may be included where the required capability already exists in approved software.

2. Confirm acceptable tools

Before wider employee use, determine:

- which tools are approved;
- which account types should be used;
- what information may be entered;
- what information must not be entered; and
- what human review is mandatory.

3. Define the pilot

For each selected use case, define:

- the specific task;
- the people involved;
- the existing way of working;
- what a useful result would look like;
- what evidence will determine whether the pilot should continue.

Do not begin with a business-wide rollout.

4. Establish a simple baseline

Understand the current process well enough to determine whether the new approach actually improves it.

Avoid claiming savings solely because a task feels faster.

Next

Review the evidence

After the initial test, assess:

- actual usefulness;
- output quality;
- employee adoption;
- review effort;
- unexpected risks;
- whether another subscription is justified;
- whether the process itself needs improvement.

Decide separately for each opportunity

Possible outcomes should include:

- expand;
- continue testing;
- modify the approach;
- return to the existing process; or
- stop.

A pilot is successful if it produces a reliable decision, even when the decision is not to proceed.

Later

Revisit opportunities currently limited by:

- inconsistent management information;
- incomplete procedures;
- fragmented knowledge;
- unclear process ownership; or
- insufficient business justification.

Do not create a technology project merely because capabilities improve.

Reassess when a meaningful business reason exists.

RECOMMENDED IMMEDIATE DECISION

Do not launch a broad AI programme.

Test two clearly defined uses first.

Use existing software where it is adequate.

Put simple information-handling and human-review rules in place.

Use the evidence from those tests to decide whether additional AI investment is justified.

How opportunities were assessed

Business problem
What specific problem, constraint or opportunity is being addressed?

Value
Would solving it materially improve how the business works?

Frequency and scale
Does the task happen often enough for improvement to matter?

Existing process
Is the process sufficiently understood and stable?

Information
Is the necessary information available, reliable and appropriate to use?

Human judgement
How much contextual judgement is required?

Can a person realistically review the output before it matters?

Risk
What could happen if the output is wrong, incomplete, inappropriate or disclosed to the wrong person?

Existing technology
Can software the business already uses address the requirement?

Cost and complexity
Would the solution introduce disproportionate subscriptions, implementation effort or technical dependency?

Reversibility
Can the business test the idea cheaply and stop if it does not work?

Evidence
What evidence would justify wider adoption?

ASSESSMENT PRINCIPLE

An opportunity is not prioritised merely because AI can technically perform part of the task.

The purpose of the assessment is to identify where AI is useful enough, controllable enough and practical enough to justify attention.

Sometimes the recommendation is to proceed.

Sometimes it is to investigate further.

Sometimes the right recommendation is to improve the existing process, use existing software or do nothing.