# A black letter on a white background  AI-generated content may be incorrect.

# AI Opportunity Assessment Template

Identify Real Use Cases. Save Time. Boost Productivity.

For New Zealand SMEs looking to explore where AI can make a difference—without the hype.

## Why Use This Template?

This worksheet helps you and your team assess which areas of your business are best suited for AI or automation tools. It's ideal for businesses who want to improve efficiency, reduce repetitive tasks, or explore what AI can actually do—before investing time or money.

## Step 1: Identify High-Volume, Low-Value Tasks

Use the examples below to help identify potential AI opportunities

**Simple AI Use Cases (Quick Wins)**

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| --- | --- | --- | --- |
| Task | Who Typically Does It | AI Tools | Outcome |
| Transcribe meeting notes | Admin/Manager | Otter.ai, Fireflies, Microsoft Copilot | Save time writing minutes |
| Summarise long emails or threads | Managers/Execs | ChatGPT, Gmail AI | Reduce cognitive load, faster email sorting |
| Auto-reply to common enquiries | Frontline Staff | Tidio, Intercom AI | Improves response time, reduces manual work |
| Auto-formatting documents | Admin/All Staff | MS Word Copilot, Grammarly | Makes documents cleaner, faster |
| Generating social media captions | Marketing | Canva Magic Write, Jasper | Consistent posting, less content fatigue |
| Drafting job descriptions | HR | ChatGPT, Notion AI | Speeds up hiring prep |
| Creating simple email templates | Sales/Admin | Gmail templates, Text Blaze | More efficient communication |
| Calendar scheduling | Admin/Execs | Calendly, Motion AI | Reduces back-and-forth |
| Generating titles for content | Marketing | ChatGPT, Headline Studio | Creative boost, faster delivery |
| Spelling/grammar corrections | All Staff | Grammarly, Word AI tools | Clean, professional writing |
| Cleaning up spreadsheets | Admin/Finance | Excel Copilot | Faster formatting & formulas |

**Intermediate AI Use Cases (Cross-Functional Efficiency)**

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| --- | --- | --- | --- |
| Task | Who Typically Does It | AI Tools | Outcome |
| Automating new staff onboarding (emails, file access, apps) | IT/Admin | Power Automate, Intune, Zapier | Faster onboarding, fewer errors |
| Creating monthly IT or business health reports | IT/Admin | Power BI, Excel Copilot | Improves visibility & confidence |
| Generating internal documentation from conversations | Operations | ChatGPT + Notion or Confluence | Captures knowledge without manual typing |
| Drafting proposals or project briefs | Sales/Operations | ChatGPT, Notion AI | Saves hours writing, increases consistency |
| Summarising feedback surveys | Marketing / Ops | ChatGPT, Excel Copilot | Faster insights from customer data |
| Updating CRM with meeting notes or call logs | Sales | HubSpot AI, Salesforce Einstein | Cleaner CRM, less admin drag |
| Setting access permissions based on roles | IT/Managers | Power Automate, Azure IAM AI integrations | Better security, fewer errors |
| Building live dashboards with alerts | Ops / Leadership | Power BI + AI | Live visibility into key metrics |
| Tagging helpdesk queries for triage | Support | Zendesk AI, Freshdesk AI | Faster resolution, better tracking |
| Auto-tagging invoices or receipts | Finance/Admin | Dext, Hubdoc, Xero AI | Faster bookkeeping, lower error rates |

**Advanced AI Use Cases (High-Leverage, Strategic)**

|  |  |  |  |
| --- | --- | --- | --- |
| Task | Who Typically Does It | AI Tools | Outcome |
| Forecasting sales or cash flow | Finance / Leadership | Excel Copilot, Power BI, Google AI Studio | Proactive planning, better decisions |
| Predicting customer churn risk | Marketing / CX | Pipedrive AI, Tableau GPT | Retain more customers |
| Inventory demand forecasting | Inventory / Ops | Azure ML, Google AutoML | Reduces stockouts & waste |
| Sentiment analysis from reviews | Marketing | MonkeyLearn, Amazon Comprehend | Real insights from unstructured feedback |
| Automatically drafting contracts | Legal / Ops | Luminance, Kira Systems | Reduce legal hours |
| Dynamic pricing strategy | Sales / Ecommerce | Custom GPT, Airtable AI | Boost margins with smarter pricing |
| Competitor trend tracking | Marketing | Crayon, Feedly AI, Semrush | Stay ahead in your industry |
| AI-powered recruitment screening | HR | Hume, Seek AI integrations | Faster shortlists, better candidates |
| Image recognition for quality control | Manufacturing | Custom Vision AI, AWS Rekognition | Reduce errors on the production line |
| Identifying risky behaviour patterns in systems | IT/Security | CrowdStrike, Huntress, Microsoft Defender AI | Proactive threat hunting |
| Creating internal chatbots | Ops / HR | ChatGPT API, Intercom Fin | 24/7 team knowledge sharing |

**Other AI Capabilities to Consider**

|  |  |  |
| --- | --- | --- |
| Area | AI Can... | Tools/Notes |
| Legal | Extract clauses, highlight risk | Luminance, ChatGPT |
| HR | Create onboarding plans, policies | ChatGPT, Notion AI |
| Sales | Personalise outbound emails | Lavender, ChatGPT |
| Finance | Classify expenses, track anomalies | Xero AI, Dext, Excel Copilot |
| Video | Create explainer videos or summaries | Synthesia, Pictory |
| Voice | Convert voice notes to tasks | Otter.ai, Fireflies |
| Code | Help build internal tools or scripts | GitHub Copilot, ChatGPT-4 |
| Training | Turn manuals into engaging micro-learning | 7taps, ChatGPT |
| Strategy | Run SWOT analyses, brainstorm ideas | ChatGPT, Notion AI |

## Step 2: Evaluate for AI Fit

For each task identified above, score the following (1–5):

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Task | Manual Repetition (1–5) | Time Impact (1–5) | AI Suitability (1–5) | Score Total (15 Max) |
| Transcribing meeting notes | 5 | 4 | 5 | 14 |
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Tasks with a score of 12 or higher are strong candidates for AI automation.

## Step 3: Prioritise Opportunities

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| --- | --- | --- | --- | --- |
| Task | Tool Recommendation | Monthly Cost (if any) | Estimated Time Saved / Month | Next Steps |
| Meeting Transcription | Otter.ai (Free / Paid) | $20 NZD | ~8 hours | Trial with internal team |
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## Step 4: Review Data & Security

1. Does it store or access sensitive client or business data?
2. Are there data privacy settings or NZ-compliant security options?
3. Do you need an AI Policy in place before rollout?

Use Vemo’s AI Policy Template to ensure your use is ethical, compliant, and secure.

## Step 5: Assign Ownership

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| --- | --- | --- |
| Action | Responsible Person | Deadline |
| Pilot transcription tool | Freddy (Admin) | 2 May |
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## Step 6: Ready to Implement?

If you’ve identified 2–3 opportunities and are ready to roll out tools, it’s time to:

1. Run a Team Pilot
Choose a small group to test the tool in real workflows for 1–2 weeks.
2. Track Time & Outcomes
Measure how long the task used to take vs. how long it takes now. Gather qualitative feedback.
3. Evaluate Fit & Risks
Does the tool integrate well? Is it secure? Does it create new risks or dependencies?
4. Update Policies
Ensure your internal AI Policy, access permissions, and data handling guidelines are up to date.
5. Decide to Scale or Park
If the pilot proves successful, roll it out more broadly. If not, park it and try another opportunity from your assessment.

### Step 7: Building an AI-Powered Process – How it Looks

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| --- | --- | --- |
| ****Step**** | ****What Happens**** | ****In Plain English**** |
| **1. Identify a Repeatable Task** | You find a task that’s time-consuming and rule-based. | E.g. “We always send the same welcome email to new clients.” |
| **2. Define the Inputs and Outputs** | What’s the starting info (input)? What do you want out the other side (output)? | Input: client name & email. Output: personalised email sent. |
| **3. Choose a Tool** | Match your task with the right AI or automation tool (e.g. Zapier, ChatGPT, Copilot). | Pick what does the job best, not just the fanciest tool. |
| **4. Build the Workflow** | Connect tools together and test how they move data between them. | E.g. “When a form is submitted, trigger a response, log it in the CRM, and alert the team.” |
| **5. Add Guardrails & Rules** | Set conditions to avoid errors or misuse (e.g. approval steps, user permissions). | “Only send if the field is filled in” or “flag if something looks off.” |
| **6. Test with Real Users** | Use real examples and team feedback to improve accuracy and usability. | People test it, break it, improve it. Then it’s ready to go live. |
| **7. Monitor & Adjust** | Track the performance of the tool and tweak it as needed. | AI gets smarter—or you find ways to make it even better. |

## Need help assessing AI for your business?

We offer a free 30-min consult to identify quick wins and create a roadmap.

[Contact Vemo](https://vemo.co.nz/contact/) | [Book Your Free CIO for a Day](https://vemo.co.nz/free-cio-for-a-day/)