



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)

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)

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

Tasks with a score of 12 or higher are strong candidates for AI automation.

Step 3: Prioritise Opportunities

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

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

Action	Responsible Person	Deadline
Pilot transcription tool	Freddy (Admin)	2 May

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

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](#) | [Book Your Free CIO for a Day](#)