

Get executive buy-in on AI priorities

Align → Qualify → Prioritize → Ask

Use real examples from your work to complete this worksheet; short phrases and a rough first draft are enough.

01 ALIGN

Start with a business priority. Develop 2–3 candidates in the same order: recurring work → current friction → meaningful result → condition to preserve.

Business priority — What consequential business outcome must improve?

OUTPUT | Opportunity Statement: *In [recurring work], reduce [friction] so that [result], while preserving [condition].*

Candidate 1

Recurring work — What repeated work materially affects the business priority?

Current friction — Where does the work wait, repeat, break, or vary in a way that matters?

Meaningful result — What should improve if the friction changes?

Condition to preserve — What cannot be compromised as the work changes?

Opportunity statement — Combine the four fields using the formula above.

Candidate 2

Recurring work — What repeated work materially affects the business priority?

Current friction — Where does the work wait, repeat, break, or vary in a way that matters?

Meaningful result — What should improve if the friction changes?

Condition to preserve — What cannot be compromised as the work changes?

Opportunity statement — Combine the four fields using the formula above.

Candidate 3

Recurring work — What repeated work materially affects the business priority?

Current friction — Where does the work wait, repeat, break, or vary in a way that matters?

Meaningful result — What should improve if the friction changes?

Condition to preserve — What cannot be compromised as the work changes?

Opportunity statement — Combine the four fields using the formula above.

02 QUALIFY

Use the same criteria to assess every candidate before choosing. Estimate based on what you know now. Do not validate every condition or prioritize yet.

Impact: frequency, pattern consistency, reach, and connection to the business priority

Effort: complexity, dependencies, and readiness: process clarity, owner, capacity, controls, and approvals

Confidence: how strongly Impact and Effort judgments are supported by facts and direct observations + unconfirmed assumptions or open questions

Candidate 1

Impact — Rate the potential impact, then note the strongest fact or direct observation supporting it.

Effort — Rate the effort, then note the most important complexity, dependency, or readiness factor.

Confidence — Rate how well the profile is supported, then name the assumption or open question most likely to change it.

Candidate 2

Impact — Rate the potential impact, then note the strongest fact or direct observation supporting it.

Effort — Rate the effort, then note the most important complexity, dependency, or readiness factor.

Confidence — Rate how well the profile is supported, then name the assumption or open question most likely to change it.

Candidate 3

Impact — Rate the potential impact, then note the strongest fact or direct observation supporting it.

Effort — Rate the effort, then note the most important complexity, dependency, or readiness factor.

Confidence — Rate how well the profile is supported, then name the assumption or open question most likely to change it.

03 PRIORITIZE

Use the comparable profiles—not a favorite idea—to choose the strongest responsible starting point and state the trade-off.

A. Why this is First

First candidate — Which candidate is the strongest responsible starting point?

Why First? — State the Impact–Effort trade-off, strongest evidence, Confidence, and most important uncertainty.

B. Bound and sequence

A bounded first move limits the users or work types, the time period, and the decision it will inform—such as continue, revise, or stop.

Bounded first move — Name the users or work types, time period, and decision this first move will inform.

Next + what must be true before it starts — Name the significant, specific condition that must become true.

Later + why it is waiting — Name the basic prerequisite that is missing or must fundamentally change.

Revisit trigger — What specific evidence, dependency, readiness condition, business change, or risk signal should prompt another comparison?

04 ASK

Draft one decision-ready recommendation. Do not re-copy the intermediate fields.

Draft recommendation: Name First and the business result, explain why it should move now and the evidence and Confidence, bound the first move and sequence, name the consequential open question, and state the decision or support needed.

[Write or paste the complete decision-ready recommendation here]

Next steps

Ask + timing — Who will you ask, what decision or support do you need, and by when?

Prompt template

Safety: Put only permitted information in approved AI tools. Validate facts and assumptions with work owners.

Use my completed worksheet notes to create a working draft. Do not to make or change the decisions. Preserve what I provide for the business priority, meaningful result, Impact, Effort, and Confidence judgments, First/Next/Later order, Revisit trigger, conditions, open questions, and Ask. Do not invent facts, evidence, ratings, owners, dates, dependencies, or decisions. Label anything missing or unsupported as “Needs input.”

Return:

1. A compact comparison of the candidates using the same Impact, Effort, and Confidence fields, with evidence separated from assumptions.
2. A draft First/Next/Later sequence and Revisit trigger using only my stated decisions.
3. A 3–5 sentence sponsor-ready recommendation that explains why First should move now, bounds the first move, names the consequential open question, and ends with the specific decision or support needed.
4. A fact-check list for me to verify before sharing.

My worksheet notes:

[Paste completed worksheet notes here]