PLANCKCYBER

INTELLIGENT SYSTEMS. PRACTICAL RESULTS.

AI Automation ROI Planning Model

A transparent worksheet for ranges, assumptions and sensitivity - not a promised return.

INTELLIGENT SYSTEMS. PRACTICAL RESULTS.

How this asset operates

Funnel stage	Commercial investigation
Audience	Finance, operations, transformation and executive sponsors
Trigger	A team needs an economic case for a workflow initiative
Objective	Build a defensible value and cost range tied to a measurable baseline
Primary CTA	Validate the baseline and run sensitivity before approval
Delivery method	PDF worksheet with optional spreadsheet implementation later
CRM action	Attach approved summary to opportunity or project evidence
Follow-up	Finance and operating review
Compliance	This is a planning model, not a forecast or guarantee. Use qualified financial, tax and accounting review where required.
KPI	Economic cases with documented assumptions and variance tracking

Use ranges, not a single optimistic number. Include hidden review work, exceptions, adoption, operating cost and the cost of being wrong.

Current-state baseline

Annual workflow volume

_____

_____

Average minutes per case

_____

_____

Fully loaded labor cost per hour

_____

_____

Current rework / error rate

_____

_____

Current direct vendor cost

_____

_____

Other material cost or risk

_____

_____

Value assumptions

Expected time reduction range

_____

_____

Expected quality / rework change

_____

_____

Capacity or revenue effect

_____

_____

Risk reduction method

_____

_____

Adoption ramp by quarter

_____

_____

Value realization owner

_____

_____

Cost assumptions

Readiness and pilot cost

_____

_____

Production build cost

_____

_____

Client internal labor

_____

_____

Cloud / model / software cost

_____

_____

Monitoring and support cost

_____

_____

Security / legal / change cost

_____

_____

Contingency

_____

_____

Core formulas

Measure	Formula / method
Annual labor cost	Volume x minutes / 60 x loaded hourly cost
Annual time value	Annual labor cost x validated time-reduction range x adoption
Quality value	Avoided rework or loss based on measured baseline
Net annual value	Validated value - annual operating cost
Payback period	Initial investment / monthly net value, where monthly net value is positive
ROI planning range	(Cumulative net value - initial investment) / initial investment

Sensitivity

Variable	Low	Base	High	Evidence source
Adoption				
Time reduction				
Quality effect				
Operating cost				
Implementation duration				

Decision and limitations

Most uncertain assumption

_____

_____

Break-even condition

_____

_____

Downside case

_____

_____

Decision

_____

_____

Reviewer and date

_____

_____

Decision record and limitations

Decision or conclusion

_____

_____

Evidence supporting the decision

_____

_____

Material limitations and assumptions

_____

_____

Accountable owner

_____

_____

Review date

_____

_____

Important

This is a planning model, not a forecast or guarantee. Use qualified financial, tax and accounting review where required.