digitalBard STRATEGIC AI ADVISORY

TEAM DECISION TOOL · 2026

The AI *Use-Case Gate*

You've sat through the demo. The room was nodding. Something still didn't add up.

Fill this out with your leadership team, not alone. A problem big enough to point AI at was never one department's to solve. Before you build a business case, run a pilot, or buy anything, this tells you whether you have a real problem worth solving, and maps what you'll need to work through next. Any AI call, any function. Run one Gate per decision.

Set your values before AI sets them for you.

If you can't name the problem without the word "AI," you don't have a use case. *You have a demo you liked.*

1 Agree on the problem you need solved, before anyone says "AI."

As a team, write the business problem in one sentence, the thing that actually hurts, not the tool you think will fix it. No "AI," no "automation." Then price how you handle it today.

THE PROBLEM

HOW YOU HANDLE IT TODAY, AND WHAT THAT COSTS (MONTHLY OR QUARTERLY)

Example: three people rekey invoices by hand, about 40 hours a month, roughly $6,000, plus the errors we chase later.

> **HARD STOP. TWO WAYS TO FAIL HERE.** Name the problem without "AI"; if you can't, it's a solution shopping for a problem. And put a rough number on what it costs you; if you can't size it, you haven't nailed it. Come back when you've got both.

2 Hear from every function.

A problem lands differently in every part of the business. Each function fills its own row. Where a row is blank, or a team can't answer, you've just found a gap, and finding it now is the point. This is where you learn the problem is bigger, or different, than any one department thought.

FUNCTION	HOW THIS PROBLEM SHOWS UP FOR US	WHAT IT COSTS US	WHAT "SOLVED" WOULD LOOK LIKE FOR US
Finance			
Marketing			
Sales			
Customer Service			
IT			
Data			
HR			
Legal			
Other			

3 Test the problem. This is the one call you can make today.

The only thing you can truly judge at this stage is the problem itself. Everything else is work you haven't done yet. Score your problem statement.

- Specific and measurable, not "be more efficient."
- The whole room agrees it's real.
- Worth more to solve than it costs to live with.

Problem score (1) (2) (3) (4) (5) *below 4, you don't have a use case yet, go back to Step 1*

4 The road ahead. Your AI-readiness roadmap.

You have a real problem. These five decide whether AI earns its place, and you won't answer them today. That's fine, knowing they're coming is the point. Mark where you stand. Wherever you're not solid is your next work.

WHAT YOU'LL NEED TO WORK THROUGH	SOLID	PARTIAL	NOT STARTED
ROI — a real number for the gain that beats the cost, not "we think so."	☐	☐	☐
Cheaper way — a process, policy, tool, or hire won't beat AI to it.	☐	☐	☐
Readiness — the data, the workflow, and the people are actually in place.	☐	☐	☐
Risk ownership — a specific person owns a wrong answer.	☐	☐	☐
Exit — you know how you'd back out, and what it costs.	☐	☐	☐

5 The gate.

One question decides it: do you have a problem worth solving, on its own, before anyone said "AI"?

Use case → Your problem scored 4 or 5 and cleared the hard stops. You have a use case worth pursuing. This is not a yes to buying AI. It's a yes to the roadmap above. The start of the work, not the finish.

Not yet → Below 4, or a hard stop tripped. A demo you liked, not a use case. Rework the problem, or walk. Come back when you can name a real one.

THREE HARD STOPS. ANY ONE MEANS "NOT YET":

1. The team can't agree the problem is real.
2. There's no way to ever put a number on the gain.
3. No named human will own a wrong answer.

6 Name the decision. Page one of your decision ledger.

Write it down: the problem, the verdict, and your first move on the roadmap. Owners come later, once the discovery starts. In 90 days, compare. Snap a photo and keep it.

DECIDED BY (THE ROOM) ____________ DATE ____________ REVISIT ON ____________

A good verdict is the start of the work, not the end of it.

WHERE THIS GOES NEXT

A verdict is a decision. A pattern is a *strategy.*

Your team just made one AI call defensible, together. Here's what your verdict is really telling you, and what to do with it.

You have a use case

Real problem, the room agrees, worth more than it costs to live with. That's the yes. But it's a yes to the road ahead, not to a purchase. The roadmap in Step 4 is your path: prove the ROI, rule out the cheaper fix, confirm readiness, name the risk owner, know your exit. Most teams find they're at the start of that road, and naming it honestly is what keeps the money in the building until AI earns it.

You have a demo you liked, not a use case

The problem wasn't specific, the room couldn't agree it's real, or it isn't worth what it costs to fix. Walking away is the decision paying off. That's not a loss. That's the tool doing its job, before the money left the building. Rework the problem, or let it go.

A WORKED EXAMPLE

Problem: Support replies take three days; the backlog is costing about $8,000 a month in churn and overtime. The room agreed it's specific, real, and worth fixing. Problem score: 4 → a use case. The road ahead: on the five roadmap items, the team marked ROI, the cheaper-way check, and risk ownership as "not started," and readiness only "partial." A real problem, and honestly the very start of the road. That map of not-yets is the work, and where it begins.

That's one decision, made honestly. Most organizations aren't short on AI ideas, they're short on problems worth solving. Telling which is which, across everything on your plate, is a bigger question than one page can answer.

Take the AI Debt Diagnostic. It scores your whole organization across the nine debts that quietly sink AI investments, and shows you where to start. Free. **digitalbard.co/the-ai-debt-diagnostic**

For the decisions that really matter, leadership teams bring it to a working session. Prefer to talk it through first? **digitalbard.co/contact**

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For 20 years I've been the person leaders call when technology, from digital services to AI, starts touching people. I help them make clear, responsible decisions before the consequences make the decision for them.