

Impact Index Workbook

Use this scoring tool to evaluate any use case before it reaches a budget conversation.

Instructions: Score each criterion 0, 1, or 2 using the descriptions below. Total the score and read against the outcome bands at the bottom.

1 Process Definition

0

Undocumented, inconsistent, or highly variable across the team

1

Partially documented with known exceptions and variations

2

Fully documented, consistent, and repeatable across the team

CFO question: "Can you show me this process on one page today?"

Score: _____

2 Automation Foundation and Friction

0

Fully manual – lives in email, spreadsheets, or individual judgment

1

Partially in a system with significant manual steps remaining

2

Already significantly automated with measurable manual friction on top

CFO question: "Is any part of this already running in a system, and how many hours per week does your team spend on what remains – fully loaded?"

Note: A score of 2 here is the single strongest predictor of compressed time to value. If the process is also deterministic and rule-based, evaluate whether automation is the right tool before assuming AI.

Score: _____

3 Data Readiness

0

Data is largely unstructured, siloed across systems, or missing

1

Data exists but requires significant remediation before use

2

Data is largely clean, or 80% can be remediated within the project timeline

CFO question: "Where does the data live today, who owns it, and when was it last audited?"

Score: _____

4 Team Readiness

0

Low digital fluency or significant change resistance present

1

Moderate fluency and openness with some hesitation or competing priorities

2

Tech-comfortable team that is actively resource-starved and involved in scoping

CFO question: "Can you show me this process on one page today?"

Score: _____

5 Financial Line of Sight

0

Outcome is vague or financial connection requires several inferential steps

1

Financial connection exists but metric is indirect or not currently tracked

2

A specific P&L metric exists, is currently tracked, and will directly move

CFO question: "Which line on the P&L does this connect to, and how will we measure movement in 90 days?"

Score: _____

TOTAL SCORE: ___ / 10

Outcome Bands



8-10

High confidence. Proceed with the right process in the right order. Define the measurable outcome, streamline the process, clean the data, engage the people, then deploy.



5-7

Proceed with caution. Identify which criteria scored low. Treat them as sequenced pre-work before deployment begins. Revisit the score when that work is complete.



4 and below

Not ready. Scope the foundational work first. Establish a timeline to re-score. Do not let a low score kill a use case — let it sequence one.

Ready to apply this to your AI roadmap? Zaelab works with complex enterprises to align AI initiatives to business outcomes. Reach out at hello@zaelab.com or visit zaelab.com