



ASCENDEA

AI / BUSINESS GROWTH / GUIDE & WORKBOOK

Assessing AI Tool Value — SME ROI Decision Workbook

A UK-focused, beginner-friendly decision workbook that helps small business owners measure a process baseline, estimate AI tool costs and capacity value, compare options, run a supervised pilot, and review actual outcomes without unsupported ROI promises.



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A practical UK workbook for measuring time, cost, risk and results before adopting an AI tool

Author: Rob Arnold · Ascendea · <https://ascendea.ai/>

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What this workbook is for

An AI tool can be useful, but a subscription is not a business outcome. The useful question is not “Which AI tool should we buy?” It is “What repeated, costly or slow piece of work are we trying to improve, and can we measure whether this tool improves it safely?”

This workbook gives a small business owner or manager a repeatable way to answer that question. It is designed for UK trades, professional services, retail and B2B teams with little technical experience. It covers the source guide’s core practical areas: valuing time, measuring a baseline, calculating direct and wider value, comparing options, implementing in stages, training people, and reviewing actual results.

Use it for one narrow opportunity at a time. Good starting examples include preparing internal drafts of customer replies, classifying enquiries for a human to route, producing a first draft from approved information, reconciling a repeated admin step, or creating a supervised internal report. Avoid using a first experiment for decisions that could materially affect someone’s health, legal position, employment, credit, safety or access to a service.

The decision you should be able to make

By the final page you should be able to record one of four clear decisions:

Decision	Meaning	Next action
Test now	The problem is real, the likely value covers the realistic cost, and controls are proportionate.	Run a small, supervised pilot.
Research before testing	The idea is plausible, but evidence, data, security, supplier or cost questions remain.	Resolve the named gaps before spending.
Improve without AI	A simpler process change, existing feature, template or outsourced service may be better.	Test the non-AI alternative first.
Stop or defer	Value is uncertain, risk is unacceptable, or the business cannot support the change.	Record why; revisit only when circumstances change.

Before you calculate anything

Choose one process, not a vague ambition

Write the work in plain language. “Use AI for customer service” is too broad. “Prepare an internal first reply for ordinary delivery-status emails, then let the service coordinator check and send it” is a process that can be observed and bounded.

Prompt	Your answer
What happens now, from trigger to finished outcome?	
Who owns the process?	
How often does it happen?	
What is frustrating, slow, expensive or error-prone about it?	
What must the tool not decide, send or change on its own?	
What happens when the tool is unavailable or unsure?	

Prompt	Your answer
What would a better outcome look like in a measurable way?	

Separate a capacity gain from cash saved

Time returned to a team is valuable, but it is not automatically cash in the bank. A three-hour saving might create capacity for quoted work, reduce overtime, improve response times, or simply make a busy week more manageable. It reduces payroll only if a real cost can be avoided or a role is genuinely not needed.

Record benefits honestly in the right column. Do not count the same benefit twice.

Potential benefit	Is it evidenced now?	How will you test it?	Treat as cash, capacity, service or risk?
Fewer minutes spent preparing an email draft		Time audit and pilot log	Capacity until a payroll or overtime cost is actually avoided
Fewer order-entry corrections		Error log before and after	Cost avoidance only if correction cost is evidenced
Faster acknowledgement of an enquiry		Response-time sample	Service metric; do not convert to revenue without evidence
More completed work from freed time		Compare demand and completed jobs	Revenue only after observed, attributable results

Establish sensible boundaries

A tool that generates text can sound confident while being wrong. The National Cyber Security Centre (NCSC) also identifies risks such as prompt injection, where untrusted content tries to make a system behave outside its intended task.¹ Start with a task that has a named human reviewer, approved inputs, an escalation route and a manual fallback.

For this workbook, do not upload personal, confidential, commercially sensitive or client information simply because a tool can accept it. First establish that you are entitled to use the information for this purpose, understand the supplier's relevant data handling and retention terms, and decide who can

access the account and output. UK data-protection duties can apply when personal data is processed in a business context.² A data protection impact assessment (DPIA) is required before processing that is likely to result in high risk to people's rights and freedoms; it is not a compliance badge.³

Part 1: Put a value on the work

Start with an appropriate hourly cost or value

For a member of staff, begin with an estimate of the cost of the time involved. Depending on your purpose, this may include pay and appropriate employer costs and overheads. Confirm the treatment with your accountant where needed. For an owner-manager, distinguish between an internal planning value for time and a personal income target. A target salary or drawings figure is not automatically the cash saving from automating a task.

Use actual working hours rather than a universal annual-hours assumption. Holidays, sickness, non-billable work, administration and sales all matter. If the task is done by more than one person, calculate each role separately.

Person or role	Annual employment cost or internal time value (£)	Realistic annual hours	Baseline hourly planning value (£)	Notes and source of estimate
Owner-manager				
Administrator / coordinator				
Sales or service lead				
Other				

Formula: hourly planning value = annual cost or internal time value ÷ realistic annual hours.

Use the result as a transparent assumption, not a claim of what an hour is “worth”. Update it when you learn more.

Add opportunity cost carefully

Some hours are harder to replace than others. If a director spends an hour rekeying information rather than reviewing a major estimate, the business may lose attention on a higher-value activity. That does not give permission to multiply every saving by an arbitrary amount.

Instead, write down the specific displaced activity and how you will check whether the time was actually redirected. Do not add an opportunity-cost figure to a direct time-value figure unless you have avoided double counting.

Work being reduced	Direct hourly planning value (£)	What could the person do instead?	Evidence that the alternative has demand or value	Include additional value now?
				Yes / No / Test first
				Yes / No / Test first

Example: a transparent time assumption

Fictional example — Northfield Property Care Ltd. A small property-maintenance company estimates that a service coordinator's fully considered planning cost is **£22 an hour**. It does not claim that every hour saved becomes £22 of profit. The team intends to use any regained capacity to reduce a backlog of customer updates. It therefore labels the benefit **capacity value**, then checks whether response times actually improve during the pilot.

Part 2: Measure the baseline before buying

Run a short time audit

A tool cannot “save” time you have not measured. Choose a representative period: one working week may be enough for a frequent, stable task; a seasonal or irregular process may need longer. Record setup, searching, correction, chasing and handover time, not only the visible final action.

1. Select one exact task and name it.
2. Give each person a simple way to log start and end time, or use a timer.
3. Record the number of items completed and anything unusual.
4. Add rework, checking and interruptions that are part of the task.
5. Calculate total minutes, average minutes per item and expected monthly volume.
6. Keep the record. It becomes the comparison point after the pilot.

Baseline time audit	Mon	Tue	Wed	Thu	Fri	Weekly total
Number of items						

Baseline time audit	Mon	Tue	Wed	Thu	Fri	Weekly total
Work minutes						
Review / correction minutes						
Rework / follow-up minutes						
Exception notes						

Baseline result	Calculation	Result
Average minutes per item	Total minutes ÷ number of items	
Monthly items	Your observed monthly volume or stated forecast	
Monthly hours for the full process	Monthly items × average minutes per item ÷ 60	
Current monthly cost/value	Monthly hours × hourly planning value	

Forecast the future state, including human work

Do not assume an AI tool removes the whole task. A usable forecast includes prompt preparation, source checking, human review, correction, exception handling, logging, supplier administration and occasional retraining. For a customer-facing task, assume that a person will need to handle unclear, sensitive or urgent cases.

Create a conservative, expected and adverse case. The purpose is to see the range, not to pick the most flattering number.

Assumption	Conservative	Expected	Adverse / slow adoption	Evidence or reason
Monthly baseline hours				
Monthly hours after tool, including review				
Monthly hours saved				
One-off setup and training hours				
Monthly management / maintenance hours				
Tool price and usage charges (£)				Current supplier quote / pricing page

Formula: monthly hours saved = current monthly process hours – future monthly process hours.

If the result is zero or negative, the current design does not create an efficiency case. That may still be acceptable for another documented reason, such as a controlled service improvement, but it should not be presented as a time-saving investment.

Part 3: Calculate the direct business case

Use three distinct calculations

Keep the calculations separate so that a single attractive percentage does not hide an expensive or fragile implementation.

Measure	Formula	What it tells you
Monthly capacity value	Monthly hours saved × hourly planning value	The estimated value of returned time before recurring costs; not necessarily cash saved

Measure	Formula	What it tells you
Monthly net capacity value	Monthly capacity value – monthly recurring cost – monthly management-time cost	Whether the recurring case is positive under stated assumptions
First-year net value	(Monthly capacity value × 12 + evidenced additional benefits) – (recurring costs for year + one-off implementation cost + setup/training-time cost)	A planning estimate, not a guarantee
First-year ROI %	First-year net value ÷ total first-year cost × 100	A comparison measure only; it is meaningful only if inputs are credible

For the final formula, **total first-year cost** includes the recurring cost for the year, implementation spend, setup and training time valued at the stated rate, and other direct costs. Keep subscriptions, usage fees, integrations, consultant fees, hardware, VAT treatment and contingency visible rather than hiding them in a single “tool cost”.

Calculate payback without mixing costs

For a simple ongoing process, calculate whether the monthly net capacity value is positive. If it is, a basic estimated payback for one-off costs is:

estimated payback months = one-off implementation and setup cost ÷ monthly net capacity value

This is a planning calculation. If the recurring benefit is not realised as cash or useful capacity, the practical payback may be longer or may not occur. Do not use a fixed “good” payback benchmark as a decision rule; a two-month return on a low-risk internal draft is different from a two-month return on a system that touches sensitive data or customer commitments.

Worked example: supervised enquiry drafting

Fictional example — for calculation practice only. Northfield Property Care Ltd. receives routine repair-status and appointment queries. The company considers a tool that prepares an internal draft using approved service information. The coordinator checks every draft and sends the message manually. The system does not set prices, make appointments or communicate without a person.

Input	Illustrative assumption	Calculation / note
Baseline time	5 hours a week	Includes reading, checking records, drafting and sending

Input	Illustrative assumption	Calculation / note
Time after pilot design	2 hours a week	Includes review and correction
Time saved	3 hours a week	Approx. 13 hours a month using 4.33 weeks
Coordinator planning value	£22 per hour	Internal planning assumption, not profit
Monthly capacity value	£286	$13 \times £22$, rounded
Tool and usage cost	£120 a month	Illustrative only; check supplier pricing
Ongoing management time	0 hours in this simplified example	In a real case, include it if present
Monthly net capacity value	£166	$£286 - £120$
One-off setup and training time	20 hours	£440 at £22 per hour
Estimated payback	about 2.7 months	$£440 \div £166$, if the assumptions hold
First-year net capacity value	£1,552	$(£286 \times 12) - (£120 \times 12 + £440)$

The example does **not** show cash savings, customer satisfaction, more sales or error reduction. Those outcomes would need their own baseline and evidence. It also excludes VAT, integration work, supplier price changes, management time and unusual customer cases. A pilot could show that review is slower than expected, in which case the figures must be changed rather than defended.

Include wider value only when it has its own evidence

The source guide rightly encourages you to look beyond time. Do so, but treat each category as a separate hypothesis. Never add a broad “competitive advantage multiplier”, forecast revenue uplift or assumed error percentage merely to improve the spreadsheet.

Value category	Baseline needed	Sensible evidence after a pilot	Common error to avoid
Error reduction	Number and cost of relevant mistakes	Same category of errors before and after; include human review catches	Counting a prevented error and saved correction time twice

Value category	Baseline needed	Sensible evidence after a pilot	Common error to avoid
Revenue impact	Conversion, repeat purchase or completed-work data with a clear period	A measured, attributable change against a sensible comparison	Claiming all sales after a launch came from AI
Capacity for growth	Demand, work volume and staffing plan	Additional work completed without adding a role, where causation is credible	Treating a forecast hiring need as money already saved
Service consistency	Response times, complaints, recontacts or quality review	A defined before/after sample	Calling a faster model response an improved whole service
Risk reduction	Specific failure, frequency and consequence	Control test, incident record or reviewed process change	Calling a risk “eliminated” because a tool was purchased

Part 4: Compare options, including doing nothing

Set your criteria before seeing a sales demonstration

An impressive demo can distract from the business problem. Score the criteria that genuinely matter to your process. Adjust the suggested weights; they must add to 100%. A high score should not override a deal-breaking legal, security, safety or service issue.

Criterion	Weight (%)	What a good score means for your business	Your score rule (1–10)
Direct business case		Credible positive value under conservative assumptions	
Ease of implementation		The team can configure and operate it with available skills	

Criterion	Weight (%)	What a good score means for your business	Your score rule (1–10)
Fit with current systems		It reduces, rather than creates, avoidable handoffs	
User experience and learning		The people doing the work can use it reliably	
Supplier support and continuity		Clear support route, export/exit options and sensible terms	
Data protection and security fit		Appropriate use, access and controls for the data involved	
Flexibility / future fit		It can support a likely next step without buying hypothetical features	
Total	100		

Score up to three options consistently

Use a 1–10 score for each criterion. Multiply each score by the weight as a decimal and add the results. For example, a score of 7 with a 20% weight contributes 1.4 points. The resulting total is out of 10.

Criterion	Weight	Option A: name	Option B: name	Option C: name	Evidence / question to resolve
Direct business case					
Ease of implementation					
Fit with current systems					

Criterion	Weight	Option A: name	Option B: name	Option C: name	Evidence / question to resolve
User experience and learning					
Supplier support and continuity					
Data protection and security fit					
Flexibility / future fit					
Weighted total / 10	100%				

Ask four practical questions of every option

1. **Problem:** What exact business problem does this solve, for whom, how often, and what happens if it is left unchanged?
2. **Implementation:** What systems, information, permissions, training and named owner are required? Can the business complete this safely with the support available?
3. **Risk:** What could go wrong, including wrong or unsuitable output, accidental disclosure, supplier outage, unexpected usage charges or loss of access? What is the fallback?
4. **Alternative:** Could a template, clearer process, existing software feature, outsourced service or ordinary automation solve the problem more simply?

Do not select a tool simply because it offers more features. A narrow tool with a controlled operating process can be more useful than a broad platform nobody owns.

Part 5: Preflight checks for data, security and marketing

Minimum security and data questions

The NCSC advises leaders to consider the consequences if confidentiality, integrity or availability of an AI system is compromised, and to build security into the full lifecycle rather than bolt it on at the end.¹ Use this as a decision checklist, not as a compliance certification.

Check before a pilot	Owner	Evidence / answer	Stop or escalate if...
State the permitted use and prohibited actions in one paragraph.			No one can say what the tool must not do.
Identify data that will be entered, who it relates to and why it is needed.			The team is relying on “we have always had this data”.
Confirm who owns the account, who can administer it and how access is removed when someone leaves.			A personal account is the only way to run business work.
Check the supplier's current terms for data use, retention, security and export/deletion options relevant to the use case.			Terms do not support the proposed use or are not understood.
Restrict access to the least people and information needed for the pilot.			The design makes broad data or customer access convenient.
Define a human review point and a manual fallback.			The output would be sent, priced or acted on without suitable authority.
Test untrusted content.			An email, document or prompt can change the tool's allowed role or expose information.

Check before a pilot	Owner	Evidence / answer	Stop or escalate if...
Decide what records and logs are necessary, who can see them and how long they are retained.			Sensitive material is retained “just in case”.
Screen for a DPIA or specialist advice need.			Processing may be high risk, involve sensitive data or make significant decisions about people.

The ICO’s AI guidance covers accountability, transparency, lawfulness, accuracy, fairness, security, data minimisation and individual rights in AI uses.⁴ Its current guidance is marked under review following the Data (Use and Access) Act, so recheck the official pages and take advice for your own use case.²

If the tool supports marketing or outreach

AI can help draft or organise outreach, but it does not change the rules for direct marketing. PECR treats companies and LLPs as corporate subscribers, while sole traders and certain partnerships are individual subscribers. The electronic-mail rules differ. Where you process identifiable business-contact data, UK GDPR still applies. For corporate electronic marketing, the ICO says you must not conceal your identity and must provide a valid opt-out address; it also advises respecting opt-outs. Individual subscribers have greater protection, so do not assume a sole trader can be treated like a company.²

Before any AI-assisted outreach	Record
Recipient type: company/LLP, sole trader, partnership or unknown	
Marketing channel: email, text, social direct message, live call, automated call or other	
PECR position and current ICO source checked	
UK GDPR lawful basis and privacy information considered where personal data is used	
Sender identity, contact details and opt-out route included	
Suppression/objection list checked and updated	

Before any AI-assisted outreach	Record
Human review confirms message is truthful, relevant and not misleading	

This is general guidance, not legal advice. The ICO notes that its B2B marketing guidance is under review. Check the current official guidance immediately before a campaign.²

Part 6: A beginner-friendly pilot SOP

Pilot operating procedure

Owner: [name and role]

Trigger: The business has a defined problem and a written decision to test one tool or process.

Inputs: Baseline log, selected tool, approved test data, supplier terms, named reviewers, risk checklist and manual process.

Output: A documented decision to adopt with limits, extend the pilot, improve without AI, replace the tool or stop.

1. **Name the pilot outcome.** Write one measurable aim, such as “reduce the average staff time to prepare an internal draft for routine stock-status enquiries while retaining human approval”. List the outcomes that are outside scope.
2. **Assign roles.** Name the business owner, day-to-day operator, reviewer, account administrator and person who can stop the pilot. A single person may cover more than one role in a small business, but the responsibilities still need to be visible.
3. **Confirm permitted information.** Use a small, appropriate test set. Remove or avoid information that is not needed. Ensure that each test record is being used with the necessary authority.
4. **Write the operating instruction.** State what the tool receives, what it may produce, which approved sources it may use, what it must not do, and when it should say “I do not have enough information”. Do not give credentials, payment details or unnecessary personal data in a prompt.
5. **Configure the smallest useful workflow.** Start with an internal draft or recommendation. Do not connect the pilot to irreversible actions, live prices, customer accounts or automatic sending unless the risks have been separately designed, authorised and tested.
6. **Test normal cases and difficult cases.** Include incomplete information, conflicting instructions, urgent messages, unusual wording, duplicate entries and unavailable source material. Keep some labelled cases out of refinement so that you can check the workflow after changes.
7. **Log each failure and correction.** Record the input category, what happened, the impact, how it was corrected and whether it is a defect, training gap, out-of-scope request or design limitation.

8. **Review at an agreed point.** Compare time, quality, correction effort, costs and incidents with the baseline. Do not judge success on a polished demonstration alone.
9. **Choose the next decision.** Adopt only if the stated evidence and safeguards are met. If not, narrow the task, extend testing, change the non-AI process or stop. “Not yet” is a useful operational decision.
10. **Document handover or closure.** If adopting, provide a short operating guide, account ownership record, support route, permitted-use boundaries, review requirements and manual fallback. If stopping, remove or deactivate pilot access and record the learning.

Exceptions and human fallback

Exception	Human response	Record
Output is uncertain, factually unclear or missing a source	Do not send or act on it. Check the approved source or handle manually.	Input type, issue and resolution
Customer request is urgent, sensitive or outside the defined use	Route to the named role using the existing process.	Escalation and response time
Tool produces unsuitable instructions or tries to follow content from an untrusted document	Stop the workflow for that item; review the instruction and access design.	Potential prompt-injection / unsafe-input event
Supplier, integration or internet connection is unavailable	Use the existing manual process; do not leave work unowned.	Outage duration and impact
Cost or usage approaches the agreed limit	Pause new usage if needed and ask the owner to decide.	Usage, forecast and decision
Privacy, security or serious quality concern arises	Stop the affected processing and involve the appropriate owner or adviser.	What happened, containment and next step

Part 7: Training, adoption and integration

Plan for the people doing the work

A subscription that nobody can use is a recurring cost, not a benefit. Build time for a short guide, practice on safe examples, questions and a review of early outputs. Keep the training practical: what the tool is for, what it is not for, what data may be used, when to escalate and how to revert to the manual process.

Training item	Owner	What the user must be able to do	Evidence of completion
Purpose and boundaries		Explain the task and the prohibited actions	
Safe inputs		Recognise permitted and prohibited information	
Normal workflow		Complete one supervised example	
Review and correction		Find an error and correct or escalate it	
Fallback		Continue work manually if the tool is unavailable	
Reporting issues		Record an issue with enough detail to investigate	

Add integrations only when justified

A connection between systems can remove a manual handoff, but it also adds permissions, dependencies and failure modes. Do not assume that an integrated workflow has a better return than a standalone workflow. Compare the additional setup, maintenance, access and risk against the specific minutes or errors it may remove.

Integration level	Potential benefit	Questions before proceeding
Standalone assistant	Quick, contained trial	Can a person copy only the necessary information safely?
Approved file or data import	Less rekeying	Who can view, update and delete the file? Is the source current?
One-way workflow automation	Fewer repeated handoffs	What happens if an event is duplicated or fails midway?
Two-way or action-taking workflow	Faster operational changes	What actions are allowed, who approves them and how can they be reversed?

Part 8: Measure actual results and decide what to do next

Review the whole process, not just the AI output

Measure the same unit of work as the baseline. Include the reviewer's time, corrections, rejected output, exceptions, supplier cost and manual fallback. A fast draft is not a faster service if it creates more checking or rework.

Pilot / review period	Baseline	Actual result	Difference	Evidence and interpretation
Items completed				
Average minutes per item				
Total staff hours				
Review / correction minutes				
Exceptions / escalations				
Relevant errors or complaints				
Monthly tool and usage cost				
Security / privacy incidents				
Manual fallback uses				

A practical review cadence

Set review points that fit the process. For a daily customer-service task, a two-week pilot review may be useful. For a monthly reporting tool, wait until enough comparable cycles exist. The dates below are prompts, not universal timings.

Review	Suggested focus	Decision to record
Before go-live	Baseline, scope, roles, access, costs, tests and fallback	Start / do not start
Early check	User questions, unsafe cases, access problems and cost surprises	Fix / narrow / pause
First meaningful comparison	Whole-process time, quality, correction and exceptions	Continue / reconfigure / stop
Periodic review	Value, cost, supplier changes, access, training and known limitations	Retain / improve / replace / retire

Do not use arbitrary pass marks

The source material suggested fixed percentages for continuing or replacing a tool. This edition does not prescribe them. A task that handles internal meeting-note drafts can tolerate different error and review levels from a workflow that affects a customer's booking or record. Agree task-specific criteria before the pilot, and treat serious privacy, safety or unauthorised-action failures as blockers even where average time savings look attractive.

Acceptance criterion	Target or boundary	Actual evidence	Pass / issue / blocker	Owner decision

Your 90-day action plan

Today: select and frame

- ☐ Name three to five repeated tasks that consume time, cause rework or delay customers.
- ☐ Select one narrow candidate with a named owner and manual fallback.
- ☐ Complete the time-value worksheet for the people who do the work.
- ☐ Write the process boundary: what the tool may support and what remains human.

This week: collect evidence

- ☐ Run a baseline time audit for the leading candidate.
- ☐ List all one-off and recurring costs, including training, usage and integration.
- ☐ Compare at least one non-AI alternative.
- ☐ Complete the data, security and supplier questions.
- ☐ If outreach is involved, check recipient type, PECR/UK GDPR duties and opt-outs before any campaign.

In the next 30 days: run a controlled test

- ☐ Choose an option using the weighted scorecard and record why.
- ☐ Define pilot inputs, reviewer, test cases, exceptions and stop conditions.
- ☐ Train the people who will use it.
- ☐ Keep a log of time, corrections, exceptions and costs.

In the next 60–90 days: decide from evidence

- ☐ Compare actual whole-process results with the baseline.
- ☐ Update the business case using actual rather than hoped-for values.
- ☐ Decide whether to adopt with limits, improve the process, test a different option or stop.
- ☐ Document account ownership, operating boundaries and the manual fallback before expanding use.
- ☐ Only then select the next opportunity; do not scale an unmeasured first tool.

Final decision record

Decision item	Your completed record
Process and owner	
Problem evidenced by	
Baseline monthly time / cost or value	
Conservative / expected / adverse result	
One-off and recurring costs	

Decision item	Your completed record
Data, security and supplier checks completed by	
Human review and fallback	
Chosen option and why	
Pilot dates and review date	
Decision: test, research, improve without AI, stop or defer	
Named person accountable for the next action	

References

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3. [ICO: When do we need to do a DPIA?](https://ico.org.uk/for-organisations/uk-gdpr-guidance-and-resources/accountability-and-governance/data-protection-impact-assessments-dpias/when-do-we-need-to-do-a-dpia/)

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