Reejig Academy

AI Opportunity Case For Change

Module 3 - The Work Architect

The artifact that gets you the meeting, the budget, and the mandate to move.

Take the Work Map you built in Module 2 and run it through the full AI opportunity method. You'll come out with an executive-ready business case that names the opportunity, quantifies the impact, and tells leadership exactly what you're asking for.

The Method

01	Start with your Work Map. Select the function or process you're analysing.
02	Filter by AI potential — feasibility, value, data readiness, risk.
03	Classify each task by AI impact — which tasks change, which go, which are new
04	Filter by business impact. Map to cost, speed, quality, risk, revenue.
05	Build recommendations, roadmap, and ROI plan. Present the case.

Before You Start

- [ ] Module 2 Work Map completed for the function you're focusing on.
- [ ] Task-level visibility — not just roles or job titles.
- [ ] Directional volume, frequency, and effort for the top tasks.
- [ ] One named executive stakeholder you're building this for.

Before You Present — Pre-Flight

- [ ] Every recommendation is grounded in a task on the Work Map — not an opinion.
- [ ] Every classification has a one-line rationale that would survive a CFO question.
- [ ] Every opportunity is mapped to at least one of the five business outcomes.
- [ ] The ROI plan measures velocity, capacity, and outcome — not consumption.
- [ ] The ask is specific: budget, people, sponsorship, decision, deadline.
- [ ] Someone who didn't build this has read it and pushed back on it.

A Reminder

You are not just analyzing work. You are building business cases. When you walk in with this, you're not pitching an idea — you're presenting evidence.

01 · Section · Function Overview

Set the context — what this function does and why it matters now

The Basics

Field	Your Input
Function / process	
Business unit it sits inside	
Function owner	
Executive sponsor (your audience)	
Headcount, run cost + value delivered	
Primary output this function delivers	

Why This Function · Why Now

Strategic reason this matters in the next 6–12 months.

The Pain — What's Broken or Slow Today

3–5 specific operational problems. Be concrete: cycle times, error rates, backlogs, escalations.

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02 · Section · Work Map Summary

List the top tasks in this function — the work that actually happens

Pull forward from Module 2. You don’t need every task — you need the top 10-16 that represent the bulk of volume, time, cost, or strategic weight.

The Top Tasks in Scope

#	Task	Workflow Step (see M2 Work Map)	Owner	Volume · Effort
01				
02				
03				
04				
05				
06				
07				
08				
09				
10				
11				
12				
13				
14				
15				
16				

Practitioner Note: *If you can’t name the task at the level of what actually gets done — go back to the Work Map. Role-level analysis won’t survive the next section. AI doesn’t replace roles. It changes tasks.*

03a · Section · Task Analysis · AI Potential + Classification

Reference guide for scoring tasks on the next page

Score each task against the four questions, then classify. One table, one pass. Score 1 (low) to 5 (high). Risk is scored as level-of-barrier — higher score means handle more carefully.

The Four Categories

Questions	What You're Asking	Watch For
Q1 · Feasibility	Can AI perform this task — or parts of it — today? Not theoretically. Today.	Over-confidence kills credibility. If you're not certain AI can do this now, score it lower. You'll be presenting this to executives.
Q2 · Value	Would AI performing this task create meaningful value — saved time, better quality, reduced cost, freed capacity?	Marginal value = move on. Focus where the impact is real. Not every automatable task is worth automating.
Q3 · Data Ready	Is the data this task depends on available, structured, and connected enough for AI to use?	Dirty or siloed data kills feasibility fast. Check data readiness before you score Q1 high — the two are linked.
Q4 · Risk	Are there compliance, ethical, reputational, or trust barriers that change how AI can be deployed here?	Risk doesn't rule AI out — it changes how. A high-risk score moves the task toward Assist, not the bin.

The Four Classifications

Category	What It Means
Assist	Human does the task. AI drafts, suggests, surfaces. Human in control the whole time.
Augment	AI takes on subtasks inside the task. Human owns the overall outcome. Most organisations should focus here now.
Automate	Agent runs the task end to end. Human reviews outputs or handles exceptions.
Only Human	Task stays with a person. Full stop. Deep judgment, empathy, creativity, or risk that AI shouldn't touch.

03b · Section · Task Analysis · AI Potential + Classification

Reference guide for scoring tasks on the next page

Score each task 1–5, then classify, then write the rationale. The rationale matters more than the label. Reference guide for scoring is on the previous page.

Practitioner Note: *The "Why" column* — keep asking "why" until you hit a business outcome. The first answer is never the real answer. Keep asking until you land on something an executive cares about.*

*"This saves time on reporting" → **why?** → "Frees analyst capacity" → **why?** "Analysts focus on decisions, not data pulls" → **why?** → "Finance closes 2 days faster - **impacts quarter-end reporting to the board.**"*

Your Master Task Analysis

#	Task	Q1 · Feas	Q2 · Val	Q3 · Data	Q4 · Risk	Category	Why* Keep asking until it's a business outcome.
01							
02							
03							
04							
05							
06							
07							
08							
09							
10							

What the Pattern Is Telling You

Step back. What clusters do you see? Lots of "Automate"? Data gaps blocking progress? Tasks stuck in "Augment" because of risk? What's the single biggest insight from this analysis?

e.g. 7 of 10 tasks are Augment-ready but data readiness is the blocker across all of them - the priority is fixing data infrastructure, not building more agents.

04 · Section · Business Impact + Recommendations

Translate task analysis into executive outcomes

Exec teams don't think in tasks or hours. They think in cost, speed, quality, risk, revenue. Translate every opportunity into those five outcomes — then name the top 3.

The Five Exec Outcomes

Outcome	Question	Who it Impacts
Cost	Can we do the same work for less? Hours, run cost, third-party spend.	Internal — finance, ops, leadership
Speed	Can we do it faster? Compressed cycle times, shorter turnaround.	Internal + Customer — faster service delivery
Quality	Can we do it better? Fewer errors, higher consistency, better decisions.	Internal + Customer — impacts output and experience
Risk	Can we reduce exposure? Compliance, errors, reputational risk.	Internal — legal, compliance, leadership
Revenue	Can we grow or protect revenue? Sales velocity, retention, conversion.	Customer — directly tied to external outcomes

Top 3 Recommendations

The specific workflows or task clusters you're recommending the business act on. Be directive. Don't list 10. Pick 3. Rough numbers beat "significant savings" every time.

#	Recommendation	Business Outcome	Who it Impacts	Est. Value
01				
02				
03				

What Stays Human

What you're intentionally not changing. Defending what stays human matters as much as what changes.

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Dependencies · Risks · Assumptions

What has to be true for these recommendations to land? Data, systems, stakeholders, change capacity, regulatory clearance.

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05 · Section · Roadmap + ROI Measurement

Sequence the work and define how you'll measure success

Phase the work in waves. Define the metrics before you start — velocity, capacity, outcome. Not consumption. Wave 1 proves the ROI. Waves 2 and 3 scale it.

The Waves

Wave	In Scope (Workflows / Tasks)	Classification Mix	Owner	Timeline
Wave 1 0-3 months				
Wave 2 3-6 months				
Wave 3 6-12 months				

Wave 1 Resources · The Ask

Resource	What It Unlocks	Owner of Securing It
People / roles		
Platform / tooling		
Budget		
Executive sponsorship		
Data access / integrations		

Your ROI Metric Plan

3 metrics across the three categories. Baseline, target, owner, cadence. If it can be proven by a license-usage dashboard, it’s a consumption metric — not ROI.

Category	Metric	Baseline	Target	Owner	Cadence
Velocity					
Capacity					
Outcome					

06 · Section · The Executive One-Pager

Your case for change — the artifact that gets the meeting

Everything above condenses to this page. It's what you put in front of the exec team. What changes. What it delivers. What you're asking for.

The Opportunity · In One Sentence

Problem + opportunity + scale. No jargon.

What Changes · What It Delivers

Outcome	In Scope	Owner
Cost		
Speed		
Quality		
Risk		
Revenue		

The Ask · Decision Needed · By When

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Next up - Module 4: *Once this case is approved, Module 4 moves you from finding the opportunity to acting on it — designing the workflows, building the first agent, and running it against a real scenario.*