



PRACTICAL AI OPPORTUNITY GUIDE

The SMB AI Use-Case Map

A department-by-department guide to finding valuable, manageable first AI pilots

Managed AI + Managed IT + Cybersecurity

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Introduction: Where to Begin with AI

The most impactful AI use cases do not come from technology alone. They emerge from costly, frustrating, or information-heavy workflows. Use this map to identify, evaluate, and select practical pilots with measurable outcomes.

How to Use This Map

1. **Identify candidate workflows:** Explore each department map for work that is ready for AI assistance.
2. **Score value and readiness:** Assess business value, readiness, and risk.
3. **Select one pilot:** Choose the highest-scoring appropriate workflow for the first pilot.
4. **Baseline current performance:** Capture time, cost, error, quality, and other relevant measures.
5. **Maintain human accountability:** Define ownership and human checkpoints at critical stages.

The AI Opportunity Lens

- **Repetitive tasks:** Frequent work with a predictable pattern.
- **High information volume:** Review, synthesis, or extraction across large amounts of content.
- **Frequent drafting or summarizing:** Reports, emails, meeting notes, and similar work.
- **Knowledge is hard to find:** Employees spend too much time locating information.
- **Predictable triage or classification:** Items can be sorted using defined criteria.
- **Clear human review point:** AI can provide a first pass that a person validates.

Poor First-Pilot Signals

- **Unclear ownership:** No designated person will champion or oversee the initiative.
- **Rare tasks:** The process occurs too infrequently to establish a useful baseline.
- **Restricted data without controls:** Sensitive information lacks necessary security and compliance safeguards.
- **High-impact autonomous decisions:** AI would make critical decisions without human oversight.
- **No baseline:** Current performance cannot be measured.
- **Many brittle integrations:** The workflow depends on complex, easily broken system connections.

Simple Use-Case Scoring Model

Score each factor from 1 (low) to 5 (high).

Opportunity Score = Business Value + Frequency/Volume + Data Readiness + Implementation Readiness + Adoption Readiness - Risk/Impact

Business Value	Cost savings, revenue, quality, or efficiency gains.
Frequency/Volume	How often the task occurs and how much work or data is involved.
Data Readiness	Availability, quality, permissions, and accessibility of relevant data.
Implementation Readiness	Technical feasibility, infrastructure, and available tools.
Adoption Readiness	Likelihood of user acceptance and workflow integration.
Risk/Impact	Potential negative consequences, complexity, or regulatory concerns.

Note: Scoring supports discussion rather than absolute precision. Focus on relative differences between opportunities.

Leadership and Management Map

Use Case	Desired Outcome	Likely Data	Human Checkpoint	Starter Metric
Meeting/Decision Brief Prep	Concise, actionable summaries for executive review	Meeting transcripts, agendas, pre-read materials, past minutes	Executive review and approval	Time to brief completion
Policy & Market Research	Accurate, verifiable insights for strategic decisions	Industry reports, news articles, regulatory documents, competitor websites	Source verification, expert review	Number of verified sources
KPI Narrative Drafting	Clear, data-backed explanations of performance trends	KPI dashboards, financial reports, operational data	Executive review and sign-off	Time to draft KPI narrative
Scenario Planning	Well-defined potential future states and strategic responses	Market trends, historical data, expert opinions, risk assessments	Strategic leadership review	Number of scenarios developed
Board Update Prep	Comprehensive yet concise overview of company performance and strategy	Financials, strategic plans, operational reports, market analysis	CEO/Board Chair review and approval	Time to board update preparation

Sales Map

Use Case	Desired Outcome	Likely Data	Human Checkpoint	Starter Metric
Account Research Briefs	Targeted insights for sales engagement	Company websites, news, social media, CRM data, industry databases	Sales rep review and customization	Time to research completion
Call Summaries & CRM Updates	Accurate and timely record of sales interactions	Call recordings, meeting notes, CRM entries	Sales rep review and verification	CRM update time per call
Proposal First Drafts	Accelerated creation of tailored sales proposals	Product/service details, customer requirements, pricing, past proposals	Sales rep review and customization	Proposal generation time
Follow-up Personalization	Relevant and timely post-meeting communications	Meeting notes, customer needs, recent industry news	Sales rep review and personalization	Response rate to personalized follow-ups
Opportunity Risk Summaries	Early identification of potential deal blockers	Deal stage, customer engagement, competitor activity, financial health	Sales management review	Accuracy of risk identification

Marketing Map

Use Case	Desired Outcome	Likely Data	Human Checkpoint	Starter Metric
Content Briefs	Clear direction for content creators	Target audience, keywords, topic goals, competitor content	Marketing manager review	Time to brief creation
Webpage Drafting & Optimization	Engaging and SEO-friendly website copy	Product/service info, target keywords, user personas, competitor sites	Content editor and SEO specialist review	Draft to publish time
Campaign Variants	Multiple creative options for A/B testing	Ad copy, headlines, imagery, target segments	Marketing strategist review	Number of variants generated
Voice-of-Customer Synthesis	Key themes and sentiments from customer feedback	Surveys, reviews, social media comments, support tickets	Marketing analyst review	Themes identified per analysis
Content Repurposing	Maximizing reach by adapting existing content	Blog posts, whitepapers, webinars, case studies	Content strategist review	Number of repurposed assets
Website Building Assistants	Controlled creation of web content adhering to brand, accessibility, and publishing standards	Brand guidelines, design assets, approved copy, SEO rules	Brand manager, editor, accessibility specialist review & approval	Time to approved webpage draft

Operations Map

Use Case	Desired Outcome	Likely Data	Human Checkpoint	Starter Metric
SOP Drafting	Clear, consistent standard operating procedures	Existing process documentation, best practices, compliance requirements	Process owner and quality assurance review	Time to SOP draft completion
Request Classification/Routing	Efficiently directing incoming requests to the right team	Ticket details, keywords, customer data, request type	Team lead review for complex cases	Routing accuracy rate
Meeting-to-Action Conversion	Automated identification and assignment of action items	Meeting transcripts, agendas, notes	Meeting chair review and assignment	Action item capture rate
Schedule/Resource Summaries	Quick overviews of availability and allocation	Calendars, project management tools, resource databases	Manager review for exceptions	Time to generate summary
Quality or Exception Analysis	Identifying deviations from standards or anomalies	Performance logs, quality control reports, system alerts	Quality analyst review	Number of exceptions identified

Customer Service Map

Use Case	Desired Outcome	Likely Data	Human Checkpoint	Starter Metric
Approved-Knowledge Answer Assistant	Fast, accurate answers to common customer queries	Knowledge base articles, FAQs, product manuals, historical tickets	Agent review for complex or sensitive queries; escalation path	First contact resolution rate
Ticket Summarization	Concise overviews of customer issues for agents	Ticket history, chat logs, email threads	Agent review for completeness	Time to ticket summary generation
Response Drafting	Assisted creation of professional customer replies	Ticket details, knowledge base, customer history, approved templates	Agent review and personalization	Agent response time
Sentiment/Urgency Triage	Prioritizing tickets based on customer emotion and issue severity	Ticket text, keywords, customer history	Agent review for critical cases	Accuracy of triage classification
Recurring-Issue Analysis	Identifying patterns of common customer problems	Ticket data, product feedback, support logs	Product/support team review	Number of recurring issues identified

Finance and Administration Map

Use Case	Desired Outcome	Likely Data	Human Checkpoint	Starter Metric
Invoice/Document Extraction	Automated data capture with validation	Invoices, receipts, purchase orders, contracts	Finance team validation of key fields (amount, vendor, date)	Time to extract and validate invoice data
Budget Variance Narratives	Explanations for financial discrepancies	Budget reports, actual spending data, variance analysis	Finance manager review and approval	Time to draft variance explanation
Expense Classification	Accurate categorization of expenditures	Expense reports, credit card statements, receipts	Finance team review for exceptions	Classification accuracy rate
Collections Follow-up Drafts	Assisted outreach for overdue payments	Accounts receivable aging, customer payment history, communication logs	Credit manager review and approval	Time to draft collection notice
Policy Q&A	Quick answers to common finance and admin policy questions	Company policy documents, finance manuals, HR guidelines	Compliance officer review for accuracy	Response time to policy questions

Guardrail: All financial posting and payment changes initiated by AI require explicit human approval.

HR and People Operations Map

Use Case	Desired Outcome	Likely Data	Human Checkpoint	Starter Metric
Job Description Drafts	Accurate and compelling descriptions for open roles	Role requirements, company culture, industry benchmarks, existing JDs	Hiring manager and HR review	Time to draft job description
Onboarding Assistant	Streamlined guidance for new hires	Onboarding checklists, company policies, HR forms, training schedules	HR representative and hiring manager oversight	New hire time-to-productivity
Policy Q&A	Accessible answers to employee questions about HR policies	Employee handbook, HR policies, benefits information	HR specialist review for complex queries	Employee satisfaction with HR support
Training Content	Drafts for learning modules and materials	Training objectives, subject matter expertise, best practices, learning formats	Training manager and subject matter expert review	Time to draft training module
Employee Feedback Themes	Summarized insights from employee surveys and feedback channels	Survey responses, exit interviews, performance review comments	HR leadership review and analysis	Themes identified per feedback cycle

Guardrail: Explicitly prohibit unsupervised AI involvement in hiring, termination, compensation, or performance decisions.

IT and Cybersecurity Map

Use Case	Desired Outcome	Likely Data	Human Checkpoint	Starter Metric
Ticket Enrichment	Adding context and categorization to IT support tickets	Ticket details, user information, asset data, knowledge base	Helpdesk agent review for accuracy	Ticket resolution time
Knowledge Article Drafting	Creating clear documentation for IT issues and solutions	Troubleshooting steps, error logs, system configurations, successful resolutions	IT specialist and knowledge manager review	Time to draft knowledge article
Alert Summarization	Condensing security and system alerts for faster review	SIEM logs, system event logs, security tool alerts	Security analyst or IT admin review	Alert review time
Asset/License Analysis	Identifying underutilized or unlicensed software/hardware	Asset inventory, license agreements, usage logs	IT asset manager review	Cost savings from optimization
Access Review Preparation	Gathering data for periodic user access audits	User accounts, permissions, role assignments, access logs	Security officer and system owner review	Time to prepare access review data
Phishing Simulation Content	Generating realistic phishing email templates	Real-world phishing examples, threat intelligence, organizational context	Security awareness trainer review	Engagement rate of simulations

Guardrail: Apply least privilege, robust logging, and review by trained personnel.

Private Knowledge Assistant Map

Component	Considerations	Notes
Suitable Sources	Internal documents, trusted external data, wikis, databases, intranets	Define scope of accessible information.
Permission Model	Role-based access, user-specific permissions, data classification	Ensure data privacy and security.
Citations	Automatic linking to original source documents	Crucial for verification and trust.
Content Owners	Designated individuals responsible for specific data domains	Facilitates updates and accuracy.
Freshness	Regular updates and re-indexing of source data	Outdated information erodes trust.
Unanswered Question Tracking	Logging queries AI cannot answer for content improvement	Identifies knowledge gaps.

Custom AI Agent Map

Component	Considerations	Notes
Agent Capabilities	Define specific tasks the agent will perform (e.g., draft emails, summarize reports)	Focus on clear, bounded functions.
Required Owner	Designated individual responsible for the agent's performance and oversight	Accountability is key.
Permissions	What systems, data, and actions the agent can access/perform	Adhere to the principle of least privilege.
Triggers	Events or requests that activate the agent	Manual, scheduled, or event-based.
Tools/Integrations	Software and APIs the agent uses	Ensure secure and tested integrations.
Exception Handling	Procedures for when the agent encounters errors or ambiguity	Define fallback mechanisms.
Human Approval	Required oversight before agent actions are finalized	Critical for sensitive operations.
Logs	Detailed records of agent actions, inputs, and outputs	Essential for auditing and troubleshooting.
Rollback	Mechanism to undo agent actions if necessary	Provides a safety net.

Never start autonomously with: external communications, financial transactions, data deletion, access changes, or regulated/high-impact decisions. Require human approval for these actions.

Quick-Win Matrix: Value vs. Readiness

Plot candidates by Business Value (vertical axis) and Implementation Readiness (horizontal axis).

	Higher implementation readiness	Lower implementation readiness
Higher business value	START HERE Meeting summaries; report drafting; simple data extraction	PREPARE NEXT Predictive analytics; complex document analysis
Lower business value	LOW-STAKES EXPERIMENT Content ideas; FAQ support; internal search	DEFER Highly autonomous decisions; complex cross-department automation

Top-Three Candidate Comparison Worksheet

Compare your strongest candidates side by side.

Candidate 1	Response
Workflow	
Owner	
Hours per month	
Users affected	
Data / integrations	
Risk (1-5)	
Human approval point	
90-day metric	
Opportunity score	

Candidate 2	Response
Workflow	
Owner	
Hours per month	
Users affected	
Data / integrations	
Risk (1-5)	
Human approval point	
90-day metric	
Opportunity score	

Candidate 3

Candidate 3	Response
Workflow	
Owner	
Hours per month	
Users affected	
Data / integrations	
Risk (1-5)	
Human approval point	
90-day metric	
Opportunity score	

Selection Notes

Selected candidate	
Why this candidate	
Decision owner	
Next decision date	

One-Page Pilot Canvas

Pilot Canvas Field	Response
Problem Statement	
Current Baseline	
Target Outcome	
Users	
In Scope	
Out of Scope	
Approved Data	
Tool / Platform	
Human Review	
Controls	
Timeline	
Owner	
Support	
Success Metric	
Stop Conditions	

Measurement Menu

Measure business impact, not just logins.

- **Time saved:** Reduction in manual effort.
- **Cycle or response time:** Time required to complete the process or respond to a customer.
- **Rework/error rate:** Reduction in mistakes or corrections.
- **Knowledge-search time:** Time spent locating information.
- **Employee adoption:** Consistent usage and qualitative satisfaction.
- **Customer satisfaction:** Impact on the customer experience.
- **Throughput and backlog:** Volume processed and reduction in outstanding work.
- **Cost per transaction:** Efficiency gains per completed unit of work.
- **Quality review score:** Improvement in output quality.

Warning: Login counts alone provide little insight into actual value or impact.

A Responsible 90-Day Path

1. **Discover and Baseline (Days 1–15):** Identify and score candidates, select one pilot, and capture baseline metrics.
2. **Secure and Design (Days 16–30):** Define scope, data sources, security controls, human checkpoints, and the Pilot Canvas.
3. **Pilot and Train (Days 31–75):** Implement the solution, train users, and collect data.
4. **Measure and Decide (Days 76–90):** Analyze results and decide whether to expand, refine, or retire the pilot.

Your First AI Pilot Awaits

- **Choose one workflow:** Identify a high-potential candidate.
- **Name an owner:** Assign clear responsibility.
- **Capture a baseline:** Document current performance.
- **Confirm boundaries:** Define data, security, and approval requirements.
- **Schedule a discussion:** Contact Monreal IT to plan a secure pilot.

Ready to turn one use case into a secure, measurable pilot?

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