



The AI ROI Scorecard

Companion Tool for "Where Did My ROI Go?" | Elevate AI Studio

Purpose: A five-minute self-assessment based on the Three Levels of AI ROI framework. Answer honestly — this isn't a test of how much AI you use, it's a check on where the return is actually showing up.

How to use this: For each statement, rate how true it is of your organization today, from 1 (not at all) to 5 (completely true). Write the number in the box. Total your score on the next page.

1 Not true	2 Rarely	3 Sometimes	4 Mostly	5 Completely
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1. Individual Productivity

Are employees actually saving time — and does anyone know it?

Employees regularly use AI to save time on everyday tasks (email, meeting notes, research, drafting). ☐

Leadership has real visibility into how much time AI is actually saving employees. ☐

Employees were trained on how to create value with AI — not just how to use the tool. ☐

Time saved by employees gets redirected to higher-value work, not just absorbed into a busier day. ☐

2. Process Improvement

Has any workflow actually been redesigned — not just accelerated?

At least one major workflow has been redesigned, not just sped up, using AI. ☐

We can point to a specific process that's faster or simpler because of AI. ☐

A whole team has measurably benefited from an AI-driven process change — not just one person. ☐

Before automating a step, we ask whether that step should exist at all. ☐

3. Customer Value

Does anyone outside your walls actually feel the difference?

Customers have noticed a real improvement in speed, simplicity, or service because of AI. ☐

We can tie at least one AI initiative to a measurable business outcome (revenue, retention, satisfaction). ☐

Our AI initiatives start with a customer problem, not with an available tool. ☐

Leadership discusses AI more in terms of business outcomes than usage or adoption metrics. ☐



Score It

Add up each section, then your total.

There's no perfect score here — only a clearer picture of where your ROI actually lives right now.

Level 1

Individual Productivity

Level 2

Process Improvement

Level 3

Customer Value

Your total score (out of 60)

12–27

Still in the Activity Trap

People are using AI, but the return is likely still invisible to your CFO. Start by building real, measured productivity habits at Level 1 before scaling anything further.

28–44

Building Real Process Value

You're seeing genuine gains, but they may be concentrated in a few pockets of the business. The next move is redesigning a full workflow, not just accelerating another task.

45–60

Leading with Customer Value

You're doing what most organizations never reach — customers feel the difference. Protect what's working, and go find the next process worth redesigning.

Want help turning this score into a plan?

This scorecard is the starting point I use with leadership teams inside workshops and consulting engagements at Elevate AI Studio — turning "where are we" into a 90-day roadmap for where the ROI actually is. If you'd like help with the next step, or just want to talk through your results, I'd love to hear from you.

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