



AI Workflow Discovery Checklist

16 Questions Every Organisation Should Ask Before Buying More AI Licences

Introduction

Before buying more AI licences, make sure your employees can effectively use Outlook, Excel and Microsoft 365, understand their workflows and have clear use cases for AI.

Many organisations invest in ChatGPT, Microsoft Copilot and other AI technologies expecting immediate productivity improvements. However, successful AI adoption requires more than licences and technology.

Use this checklist to assess current readiness, identify productivity opportunities and determine where AI can deliver measurable business value.

Assessment Instructions

For each question, consider the current situation within your organisation and record any observations, examples, concerns or opportunities identified during the assessment.

Where possible, include specific examples, departments, processes or workflows that may require further review.

AI Usage & Adoption

1. Do employees currently use ChatGPT, Microsoft Copilot, Claude or other AI tools?
2. Are existing AI licences being actively and consistently used?
3. Are employees receiving role-specific AI training?

Outlook, Excel & Microsoft 365 Skills

4. Are employees making effective use of Microsoft Outlook features such as Rules, Quick Steps, Categories and Search Folders?
5. Do employees possess the Microsoft Excel skills required for reporting, analysis, validation and decision-making?
6. Are existing Microsoft 365 productivity features and tools being fully utilised before introducing additional AI solutions?

Workflow Analysis

7. Which tasks consume the most employee time?
8. Which tasks are repetitive and follow predictable processes?
9. Which activities involve significant document creation, reporting or communication?
10. Which workflows require employees to spend excessive time searching for information?
11. Are meeting administration, minutes and follow-up activities creating unnecessary workload?
12. How much time do employees spend searching for documents, policies, procedures, emails or organisational knowledge?

Governance & Risk

13. Have AI governance requirements been defined?
14. Do employees understand what AI outputs require human validation and approval?

Why Measure AI ROI?

Many organisations invest in AI expecting productivity improvements, but few establish a clear baseline for measuring success.

Before implementing AI, consider how time is currently spent on activities such as email management, reporting, meetings, document creation and information retrieval. After implementation, compare the same activities to identify measurable improvements.

Time savings, productivity improvements and successful use cases should be recorded and shared within the organisation. This helps demonstrate ROI, reinforce AI adoption and identify additional opportunities for improvement.

The greatest AI ROI is often achieved when organisations invest in both AI adoption and foundational skills such as Microsoft Outlook, Microsoft Excel and Microsoft 365 productivity training.

Without measurement, organisations may struggle to determine whether AI has delivered meaningful business value or simply introduced another technology platform.

Business Value & Measurement

15. How will productivity improvements and time savings be measured before and after AI implementation?

16. Are AI initiatives aligned to business objectives and measurable outcomes?

Assessment Summary

After completing the checklist, summarise the most important findings identified during the assessment.

Priority Productivity Opportunities

List the areas where productivity improvements are most likely to be achieved through better use of existing tools, workflow improvements, AI adoption or employee training.

Examples:

- Reporting and document creation
- Email management
- Meeting administration
- Information retrieval
- Data analysis

Key Challenges & Risks

List the main obstacles that may limit productivity improvements or successful AI adoption.

Examples:

- Low AI adoption
- Limited Outlook or Excel skills
- Lack of governance
- Data quality concerns
- Unclear business objectives

Recommended Actions

List the most important actions the organisation should consider next based on the assessment findings.

Examples:

- Conduct an AI Workflow Discovery Assessment
- Improve Outlook productivity skills
- Provide Excel reporting training
- Develop AI governance guidelines
- Identify department-specific AI use cases
- Pilot Microsoft Copilot in selected teams

About College Africa Group

College Africa Group helps organisations identify practical AI opportunities through AI Workflow Discovery, AI Adoption Assessments, Microsoft Copilot Consulting, ChatGPT Consulting and AI Strategy Consulting.

What our clients say about us

Regards

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