proveo

The AI ROI Playbook

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A practical guide to proving value with AI

Getting to value with AI

AI can pay off, but the return rarely shows up by itself. Finding it takes a clear view of the business levers, the problems customers actually have and the places where work slows down or margins leak. A tool that saves minutes in the wrong place does not change the result.

These eleven strategies cover workflows, metrics, governance, scaling, leadership and agents. They are starting points, not universal rules: a narrow use case with an honest baseline can tell you more than a long list of pilots.

Eleven strategies for unlocking AI ROI

01

War-game an AI-native rival

Ask your strongest people to design the company that would undercut you with AI. Their answer shows where you are exposed sooner than an outside report.

02

Measure at the workflow level

Minutes saved on single tasks rarely convince a finance team. Break whole workflows into their steps and measure the change across the chain.

03

Track revenue per employee

Fewer roles is one story. Whether the same team produces more is usually the more valuable one, and the harder one to fake.

04

Define ROI for your context

Where skilled people are hard to hire, time returned to them and lower attrition can be worth more than a smaller payroll.

05

Use governance to move faster

Security and compliance slow AI down when they arrive late. Agree early on what is allowed, what is checked and who decides.

06

Put AI inside the work

Tools that live in a separate tab get forgotten. Build AI into the steps people already take, or redesign the process so it is the obvious path.

07

Lead by doing

A leader who uses the tools in real work convinces more skeptics than a policy memo. Show the result first, then ask others to try.

08

Write down the why before building

Before an agent is approved, its owner states who it serves, why it is needed now and what success looks like. That baseline makes measurement possible.

09

Give everyone time to practice

Set aside dedicated time for the whole company to build with AI tools. Hands-on practice changes habits faster than passive training.

10

Prefer narrow agents to broad ones

General assistants tend to produce small, diffuse gains. An agent built for one domain problem is easier to measure and more likely to move a number.

11

Manage AI as a portfolio

Broad adoption, process redesign, new customer channels, domain expertise and coding capability each create value in a different way. Fund and measure them separately instead of treating AI as one initiative.

CONTEXT

Past the job-loss headlines

Predictions of mass job loss make good headlines and help justify high valuations, but evidence of broad labor displacement is still thin. Productivity gains are real in software development and other knowledge work. They have not yet turned into consistent revenue growth. Separate genuine improvement from cost cutting that is simply labelled AI.

Move with your own people, not with the loudest narrative.

1. **Treat AI as a lever, not a cure**
   Some companies grow with fewer people, but most have not yet seen the productivity they paid for.
2. **Use internal talent first**
   Your best people know where the business is exposed. Give them the mandate to act, not a consultant's report.
3. **Plan for new work, not only less work**
   Earlier automation waves removed some roles and created others. Prepare for both.
4. **Watch the human side**
   Handing thinking and contact over to AI can weaken judgement and working relationships.

WORKFLOWS

Value lives in the workflow

Personal productivity and company-wide value are different problems. Organize AI in layers: individual assistants, sharing within teams, automation of core workflows and a single entry point for the whole organization. Each layer needs its own measure.

Start with clear outcomes and small teams, then add coordination as value is proven.

1. **Break workflows into parts**
   Map the main workflows into their components so savings show up where finance looks.
2. **Offer one front door**
   A single entry point helps people find the right tool and data instead of guessing between many.
3. **Build small mixed teams**
   Pair technologists with domain experts around one outcome, such as contract review or inventory planning.
4. **Work in short cycles**
   End each cycle of a few months with a decision: scale it, change it or stop it.

MARKET

Reading the market signals

The large AI investments of the technology companies are mostly funded from current cash flow, which sets them apart from earlier bubbles. For a company buying AI, the useful questions are what these economics mean for prices and which metrics show real value.

Look at output per person and at unit costs, not at announcements.

1. **Read demand for capacity**
   Providers who say they are short of compute are signalling demand, not overcapacity.
2. **Expect thinner margins**
   Compute and inference costs keep AI services less profitable than classic software, so prices can move.
3. **Count speed as value**
   Faster answers lead to more use. Response time belongs in the business case.
4. **Track revenue per employee**
   The telling question is whether a team generates more with the same or even more people.

METRICS

Redefine ROI for your context

In regulated and safety-critical settings, the hard part is rarely finding a tool. It is moving from isolated pilots to value for the organization through careful vendor evaluation, clear governance and change management. Financial return is only one of the measures that count.

Choose measures that match the constraint you actually face.

1. **Test vendors in real work**
   A longer pilot with the people who will use the tool reveals fit and trust problems before rollout.
2. **Measure the scarce resource**
   Where skilled staff are hard to hire, time returned and lower burnout can be the main return.
3. **Bring finance and compliance in early**
   A steering group with a clear intake process ties investments to strategy and speeds up approval.

GOVERNANCE

Governance that speeds things up

The first question a large organization asks about agents is whether they can be used safely. Governance answers that question. Settled early, it removes the uncertainty that actually blocks deployment, and it makes speed sustainable rather than risky.

Have the governance conversation first, not after the pilot.

1. **Know where AI runs**
   Keep an inventory of AI use, test models and data for weaknesses, and guard against unwanted behavior in operation.
2. **Share one vocabulary**
   A common list of AI risks lets legal, engineering, security and business discuss them in the same terms.
3. **Make ownership cultural**
   A cross-functional team that revisits its assumptions regularly beats rules handed down once.

SCALING

From pilot to production

Launching a pilot is easy. Landing it in daily work is the hard part. Decide which pilots deserve to scale and which to stop, and manage them as a portfolio: some for proven value, some for new customer value, some purely for learning, each with a time limit.

Judge pilots on outcomes, and be open about what changes for people.

1. **Collect ideas in one place**
   A shared register prevents duplicate experiments. Local experts rank ideas by business outcome, not novelty.
2. **Embed, do not bolt on**
   Adoption fails when AI is a detour from core work. Make it the natural path.
3. **Measure outcomes, not activity**
   Prompt counts say little. Count capabilities in production and processes that measurably improved.
4. **Be open about roles**
   Show people how their work will change and where their skills can move. Resistance drops.

LEADERSHIP

Lead from the front

In an established business, mandates alone rarely change how people work. Visible, hands-on use by leaders does more, especially when the aim is growth rather than a smaller headcount. The companies that gain most will use AI to expand what their people can do.

Show results instead of announcing them.

1. **Work alongside the team**
   A leader who spends real time building with the tools gives skeptics evidence, not instructions.
2. **Choose growth over cuts**
   Using AI mainly to remove people can become a downward spiral. Amplify what people can do instead.
3. **Hire open-minded people**
   Willingness to try new tools matters more as the tools change faster.

AGENTS

Keeping every agent in view

When agents multiply across an organization, nobody can govern what they cannot see. Structured intake, clear metrics and a cross-functional council let you scale the number of agents without losing control of them.

No agent without an owner, a purpose and a baseline.

1. **Define the why first**
   Who does the agent serve, why is it needed now and what does success look like?
2. **Separate three kinds of metric**
   Efficiency, activity as an early signal, and the outcomes leadership cares about.
3. **Review before you build**
   A regular council checks feasibility, architecture and strategic fit before an agent is approved.

ADOPTION

AI as a growth lever

When AI capability takes a visible jump, the companies that act on it decisively pull ahead. Company-wide adoption depends on practice, on context the tools can draw on, and on people who want to experiment.

Practice beats passive training.

1. **Set aside a hands-on week**
   Dedicated time for everyone to build with AI changes habits faster than another course.
2. **Start with a personal assistant**
   Each person describes their role and asks the AI to help them plan, prioritize and review their work.
3. **Give agents a knowledge base**
   Shared company, team and personal sources keep agents useful whichever model runs them.
4. **Hire for curiosity**
   Experience combined with curiosity outperforms credentials alone.
5. **Tie ROI to department goals**
   Measure against each team's own KPIs, such as cost per case or revenue, and adjust in short cycles.

DESIGN

Where agents create value

An agent that always gets it right on its own is a misconception. Value comes from deciding where an agent helps, where a person stays in the loop and which architecture survives the next model change. Building faster also means making mistakes faster.

Keep agents narrow, replaceable and supervised.

1. **Go vertical**
   Agents built for one domain cut real costs. Horizontal ones rarely move a financial number.
2. **Plan for replacement**
   Pluggable components let you swap models without rebuilding what users see.
3. **Keep a person in the loop**
   Agents should ask before they act, accept correction and improve from it.
4. **Start in one department**
   Begin with narrow problems such as sorting requests or monitoring equipment, then expand.

PORTFOLIO

Five ways AI creates value

AI is moving from tools that talk with us to tools that work for us. Where your organization stands, from access and first use through proficiency to new ways of working, decides which value model applies and how to measure it.

Fund and measure each value model on its own terms.

1. **Broad adoption**
   Everyone uses AI as an assistant. Quick gains that need change management to last.
2. **Process redesign**
   Reinvent how the work gets done instead of copying the old workflow onto a new tool.
3. **New customer channels**
   Meet customers through AI conversations and apps inside the assistants they already use.
4. **Domain depth**
   Specialized capabilities that make work possible that could not be done before.
5. **Wider coding capability**
   Agents that understand dependencies across systems, procedures and contracts, not only software.

Return on AI is rarely one number. Pick the value model you are in, set a baseline before you build, and decide at the end of every cycle whether to scale, change or stop.

Inspired by Section's The AI ROI Playbook (Spring 2026). Text rewritten by Proveo.