



INTELLISYNC
SOLUTIONS

CANADIAN SMALL BUSINESS WORKBOOK / 08

AI Use Case Qualification Sheet

A worksheet for separating real AI-native opportunities from shallow automation ideas.

STRUCTURE - CLARITY - BETTER DECISIONS

Practical architecture for accountable AI-enabled work.

What this template is for

Qualify a use case by decision value, repeatability, context requirements, risk boundaries, and operational ownership. Use this guide to make the operating choice explicit, test it with evidence, and record who owns the next decision.

BEST USED WHEN

Teams turning architecture work into a reusable operating artifact.

WHO SHOULD BE IN THE ROOM

Include the workflow owner, a person who performs the work, a reviewer with authority to approve or stop it, and the relevant data or tool owner.

CANADIAN CONTEXT

Confirm applicable federal, provincial, territorial, sector, professional, contractual, accessibility, and bilingual-service requirements. Use this workbook as operational preparation, not legal advice.

A five-step working rhythm

01

Frequency

How often does this use case occur, and who feels the pain?

02

Decision leverage

What business decision becomes clearer or faster?

03

Context dependency

Which sources must be available for the AI to be useful?

04

Human role

Where must a person review, approve, edit, or override?

05

Risk boundary

What should this system never decide, say, or execute?

Build the working record

Complete one record for one workflow. Write enough to support a decision, not a generic technology wish list.

PROMPT	YOUR WORKING NOTES
01 Proposed use case	
02 User or team served	
03 Decision improved	
04 Frequency	
05 Decision leverage	
06 Context dependency	
07 Decision, owner, evidence, and review date	

Qualify a meeting-summary use

STARTING FRICTION

A summary may look useful, but the team must identify who acts on it and how errors are corrected.

WORKFLOW MAP



AI-SUPPORTED ROLE

Organize evidence on frequency, decision value, context needs, and risk before build approval. Flag uncertainty around frequency.

HUMAN AUTHORITY

The business owner makes the go, defer, redesign, or reject decision. Resolve the frequency question for this case.

PILOT MEASURE

Track qualified use cases, missing inputs, pilot outcomes, and ideas stopped before unnecessary build. Record frequency exceptions separately.

DISCUSSION PROMPT

What evidence would the reviewer need to trust, correct, reject, or escalate this output?

Qualify a demand forecast

STARTING FRICTION

Seasonal sales are variable; the owner needs a decision that the forecast actually improves.

WORKFLOW MAP



AI-SUPPORTED ROLE

Organize evidence on frequency, decision value, context needs, and risk before build approval. Flag uncertainty around decision leverage.

HUMAN AUTHORITY

The business owner makes the go, defer, redesign, or reject decision. Resolve the decision leverage question for this case.

PILOT MEASURE

Track qualified use cases, missing inputs, pilot outcomes, and ideas stopped before unnecessary build. Record decision leverage exceptions separately.

DISCUSSION PROMPT

What evidence would the reviewer need to trust, correct, reject, or escalate this output?

Qualify an exception assistant

STARTING FRICTION

A promising analysis tool is not ready until source access, validation, and review rights are clear.

WORKFLOW MAP



AI-SUPPORTED ROLE

Organize evidence on frequency, decision value, context needs, and risk before build approval. Flag uncertainty around context dependency.

HUMAN AUTHORITY

The business owner makes the go, defer, redesign, or reject decision. Resolve the context dependency question for this case.

PILOT MEASURE

Track qualified use cases, missing inputs, pilot outcomes, and ideas stopped before unnecessary build. Record context dependency exceptions separately.

DISCUSSION PROMPT

What evidence would the reviewer need to trust, correct, reject, or escalate this output?

Before the pilot grows

Use these prompts to test whether the proposed workflow can operate responsibly in its Canadian business context.

01

Frequency

The use case improves a real workflow, not just a demo moment. Name the owner and the operating decision before selecting a tool.

02

Decision leverage

The expected output can be reviewed or measured. Record the approved sources, permissions, and missing information.

03

Context dependency

The data sources and owners can be named. Test this boundary with representative and adverse cases.

04

Human role

The AI role can be bounded clearly. Preserve review, escalation, and correction evidence.

05

Risk boundary

The downside risk is understood before launch. Set a measurable stop condition and the next review date.

06

Readiness to proceed

A strong use case is not just technically possible. It has a workflow owner, context source, review path, and reason to exist.

CANADIAN REFERENCE POINTS

Office of the Privacy Commissioner of Canada - Privacy and artificial intelligence
priv.gc.ca/en/privacy-topics/technology/artificial-intelligence/

Government of Canada - Artificial Intelligence guidance, principles, and policy
canada.ca/en/services/science/innovation/artificial-intelligence.html

General operational guidance only. Confirm applicable legal, privacy, cybersecurity, professional, contractual, and regulatory requirements with qualified advisors.