

The Transformation & ROI Plan: The definitive business case for the pilot, quantifying the efficiency (time saved) and effectiveness (strategic lift) of the workflow

Instructions: Use this template to calculate the ROI of your design. This document acts as the "Green Light for budget approval. This example below is for a proposal transformation.

1. TASK ALLOCATION ANALYSIS

We deconstructed the workflow and assigned tasks based on the EPOCH Matrix.

STEP	TASK	OWNER	RATIONALE
1	Ingest RFP	AI	High volume, rule-based data extraction.
2	Retrieve Data	AI	Structured search across CRM/SharePoint.
3	Define Strategy	Human	Requires judgment and client context.
4	Draft Content	AI	Generates the 80% baseline draft.
5	Refine & Polish	Human	Human alpha step: Tone and persuasion.
6	Final Approval	Human	Governance step: Risk and compliance check.

2. THE COGNITIVE DIVIDEND (Efficiency ROI)

How much capacity are we creating?

- **Baseline:** Manual process takes **20 hours/week** per rep.
- **Automation:** AI now handles Steps 1, 2, and 4 (the "Drudgery").
- **Result: 14 Hours Repatriated / week.** (*70% reduction in admin work*).

3. THE PERFORMANCE AMPLIFIER (Effectiveness ROI)

What is the business impact of that capacity?

- **Metric:** Proposal Win Rate.
- **Benchmark:** Industry data shows AI-augmented sales teams see a **15–25% lift**.
- **Projection:** By shifting 14 hours from "typing" to "strategizing," we forecast a **20% increase in win rate** within 6 months.

4. THE HUMAN REINVESTMENT (Alpha)

Where does the saved time go? The 14 hours will be formally reinvested into:

1. **Proactive Strategy:** Building "Shadow Proposals" for target accounts before RFPs drop.
2. **Deep Personalization:** Tailoring executive summaries to specific buyer psychology.
3. **Field Alignment:** Spending more face-time with Account Executives.

Approved: _____ (Executive Sponsor)