DEN AGENTIC AI · PRACTICAL WORKSHEET

AI Task & Use Case Discovery Worksheet

Identify which tasks, processes, and workflows in your organisation are genuinely suited for AI support — and which type of AI applies. Start with the work, not the technology.

Task-First Approach | Department-Level

STEP 1
Choose one department or team. Run through the four friction lenses on this page to surface candidate tasks.

STEP 2
Complete the Discovery Table on page 2 — one row per task identified. Be specific about what the AI would actually do.

STEP 3
Apply the priority filter. Carry the top 3 tasks forward to the Prioritization Guide for scoring.

DEPARTMENT/TEAM
Write here

STEP 1 — THE FOUR FRICTION LENSES

Where Is the Work Slowing Down?

The best AI use cases are found by examining real friction — not by looking at AI capability lists. Use each lens to surface tasks that genuinely cost time, introduce errors, or create bottlenecks.

⏱ Time Drain

"What tasks consume the most time without adding proportionate value?"

LOOK FOR:
Repetitive manual work, copy-paste between systems, formatting and reformatting, recurring report creation, scheduling coordination

⚠ Error & Exception

"Where do mistakes happen most often — and why?"

LOOK FOR:
Manual data entry errors, inconsistent responses to customers, missed steps in processes, version confusion, compliance gaps

🔍 Knowledge Access

"Where do people spend time finding information they should already have?"

LOOK FOR:
Searching shared drives for policies, asking colleagues the same questions repeatedly, waiting for expert input, inconsistent SOP knowledge

💼 Commercial Opportunity

"Where could speed or quality improvements directly drive revenue or retention?"

LOOK FOR:
Slow proposal turnaround, generic outreach, delayed customer responses, manual research before calls, reporting lag for decisions

IMPORTANT PRINCIPLE

Start with the task, not the tool. Resist the urge to begin by asking "what can ChatGPT do?" — instead, ask "where is the work hard, slow, inconsistent, or expensive?" The right AI application becomes obvious when you start from the friction, not the feature list.

REFERENCE — THREE AI APPLICATION TYPES

AI Assists

AI drafts, suggests, summarises, or analyses. A human reviews and decides before anything is acted upon.

Writing first drafts, summarising documents, generating meeting notes, research assistance

AI Automates

AI handles a defined, bounded task end-to-end within a workflow — with human review at checkpoints.

Invoice data extraction, ticket classification, report generation, email routing by intent

AI Acts (Agentic)

AI orchestrates multi-step tasks across tools and systems, taking sequential actions toward a goal.

Research → synthesise → draft → schedule outreach; end-to-end onboarding workflows

Use the table on Page 2 to capture each task identified through the four lenses above.

→ Continue to Page 2

STEP 2 — TASK DISCOVERY TABLE

Capture Your Candidate Tasks

Complete one row per task. Be specific — describe what actually happens today, not a general category. Aim for 6–10 tasks before filtering.

#	TASK OR PROCESS NAME	WHAT HAPPENS TODAY (MANUAL STEPS)	WHO DOES THIS & HOW OFTEN?	EST. TIME COST	FRICTION LENS	AI TYPE (A/B/C)	RISK LEVEL
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							

Friction lens codes: TD = Time Drain · EE = Error & Exception · KA = Knowledge Access · CO = Commercial Opportunity

AI type codes: A = Assists · B = Automates · C = Acts (Agentic)

Risk level: Low / Med / High (based on consequence of AI error)

STEP 3 — PRIORITY FILTER

Which 3 Tasks Should You Prioritise?

Apply this quick filter to the tasks above. The tasks that pass the most criteria are your top candidates to carry forward for formal scoring.

Advance if YES to most of these

- ☐ The task is repetitive and follows a recognisable pattern
- ☐ The cost of the current manual approach is clearly visible (time, errors, delays)
- ☐ The data or content the AI needs already exists and is accessible
- ☐ A human can review the AI output before it is used or acted upon
- ☐ Success can be measured (time saved, error rate, speed of output)

Pause if YES to any of these

- ☐ The task requires complex human judgment that is difficult to define or verify
- ☐ Errors in AI output could cause serious legal, financial, or reputational harm
- ☐ The underlying data is unreliable, inconsistent, or inaccessible
- ☐ The process itself is broken — AI will automate the problem, not solve it
- ☐ No one has clear accountability for reviewing or owning the AI output

NEXT STEP

Take your top 3 tasks to the AI Value & Use Case Prioritization Guide

Score each against business value, feasibility, readiness, risk, and governance to confirm priority order.

denagenticai.com
/resources