

AI WORKSHOP

Idea Theorem AI Workshop Guide

A practical process for identifying and prioritizing AI automation opportunities

We help your team move from everyday operational friction to a defined, team-owned AI opportunity that is ready for an informed build decision.

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| 1 | Discovery | Understand the work and surface the real friction |
| 2 | Translation | Turn pain points into clear solution opportunities |
| 3 | Solutioning Build | Compare impact and readiness and select a priority |
| 4 | and deploy | Deliver the first solution within the operating environment |
| 5 | Momentum | Use the first implementation to guide what comes next |



HOW TO USE THIS GUIDE

A clear path from business problem to first build

This guide explains how our workshop helps business leaders choose an AI automation opportunity that is useful, feasible, and understood across the organization.

You do not need a finished AI strategy before attending. Bring the processes that consume time, create inconsistent outcomes, or make information difficult to use. We structure the discussion and identify what the organization needs to decide next.

The questions we help you answer

01 Where is the friction Which tasks, handoffs, decisions, or information gaps affect the work today.	02 Where can AI help Which problems suit AI and which need another type of improvement.
03 What should come first Which opportunity offers the strongest balance of impact and readiness.	04 What would we build How the selected capability fits the user journey and technical environment.
05 What happens next What the first implementation requires and how it can support future work.	The central outcome A shared first priority, a ranked backlog, and a consistent specification for proposed solutions.

OPPORTUNITY AREAS

Where AI automation can improve the work

A useful starting point is any process that feels slow, repetitive, inconsistent, difficult to scale, or dependent on information that employees struggle to find.

Knowledge access Find approved answers across manuals, policies, case histories, and internal documents.	Document work Extract, classify, compare, summarize, and route forms, reports, contracts, or applications.
Customer service Help teams retrieve context, prepare responses, and handle recurring requests more consistently.	Workflow automation Coordinate repetitive steps, approvals, follow-ups, and actions across systems.
Operational monitoring Flag unusual readings, transactions, conditions, or emerging risks for review.	Decision support Surface relevant evidence, forecasts, and recommendations while keeping people accountable.

STAGE 1

Discovery

We begin with the work itself. Our team listens to the people who perform, manage, support, and govern the process before recommending a solution. We present a concept case that reflects our initial understanding of the problem and opportunity. Your team then confirms what we understood, corrects what we missed, and adds the process details that may not appear in formal documentation.

What we examine

Area	What we look for
Current workflow	Steps, handoffs, decisions, exceptions, and unofficial workarounds
People and experience	Who performs the work and where employees or customers encounter friction
Systems and information	Applications, documents, data sources, searches, and repeated entry
Operational effect	Delays, rework, inconsistencies, missed signals, and capacity constraints

How the session works

We use an interactive FigJam board so participants can add notes, react to findings, flag missing information, and contribute in real time. This captures knowledge from across the organization instead of relying on one department's view.

Discovery output

A shared, evidence-based view of the problem and the people affected by it.

STAGE 2

Translation

We convert each relevant painpoint into a clear problem statement and then map it to a practical solution opportunity.

A complaint describes an experience, but it does not yet explain the cause, the business effect, or the capability that could help. Translation makes the opportunity specific enough to evaluate.

Step	Definition	Example
01	Raw pain point Problem	I never know whether a reading is normal or a problem for my site.
02	statement AI	Operators lack a reliable reference baseline, so unusual conditions may be identified too late.
03	opportunity	Flag anomalous readings automatically and provide a plain-language explanation for review.

We also test whether AI belongs

Some problems are better solved by simplifying a workflow, improving an interface, integrating existing systems, clarifying ownership, or using rules-based automation. We recommend AI where it adds a clear capability, such as language understanding, prediction, classification, recommendation, anomaly detection, or multi-step assistance.

What makes an opportunity clear

The user and current problem are specific. The proposed capability fits a real workflow.

What makes an opportunity clear

The expected operational benefit can be described, and the role of human review is understood.

Translation output

A set of defined opportunities that can be compared on common criteria.

SOLUTION PRIORITIZATION

Solutioning

We compare each opportunity by its potential impact and the organization's readiness to implement it.

This step prevents a team from choosing a project because the technology sounds impressive. It also avoids selecting an easy project that offers little practical value.

Impact

How much could the opportunity improve speed, quality, consistency, capacity, customer experience, decision-making, or risk management?

Readiness

How prepared are the data, workflow, systems, governance, ownership, and employees to support the solution?

The impact and readiness map

	Lower impact	Higher impact
Higher readiness	Useful improvement	Strong first build candidate
Lower readiness	Defer or reconsider	Strategic opportunity requiring preparation

Solutioning output

A team-owned first priority and a ranked backlog for what can follow.

COLLABORATIVE DECISION

How your team selects the first build

We bring back a focused set of consolidated solutions and present each one through the same framework.

Step	Activity	What happens
01	Walk through	We explain the user, trigger, workflow, AI action, human review, and expected benefit from end to end.
02	React	Participants raise questions, add exceptions, identify constraints, and refine the proposed experience.
03	Vote	The team evaluates impact and priority on the shared FigJam board using the evidence gathered together.
04	Align	The group agrees what to start with and preserves the remaining opportunities as a ranked backlog.

Why shared ownership matters

AI implementation can change workflows, responsibilities, and decision paths. People are more likely to understand and support the selected direction when they helped define the problem and compare the options.

STAGES 4 AND 5

Build, deploy, and create momentum

After the team selects the first priority, we can move from definition of focused delivery while keeping the build connected to the original problem.

Phase	Work	Purpose
01	Validate	Confirm assumptions, data access, controls, and the intended measure of
02	Build	improvement. Create the focused capability and the surrounding user experience.
03	Integrate	Connect relevant systems, information, roles, and workflow actions.
04	Deploy and learn	Test in context, monitor performance, collect feedback, and improve.

Responsible delivery considerations

Human review Keep people responsible where judgment, accountability, or safety requires it.	Security and access Define how users, systems, and data are authorized and protected.
Performance monitoring Track whether the capability performs reliably within the real workflow.	Adoption Design around how employees perform the work and support the change appropriately.

WORKSHOP OUTCOME

What your organization leaves with

A shared view of operational friction Business and technical participants understand the same underlying problem.	Defined AI opportunities Each opportunity connects a specific problem to a practical capability.
A first priority and ranked backlog The team agrees what should come first and what can follow.	Full solution specifications Leadership can evaluate workflow, architecture, data, technology, timeline, and pricing.

Who should participate

The workshop is most useful when it combines decision authority with firsthand process knowledge. The exact group depends on the opportunity.

Business leadership Business owner or executive sponsor; operations leader and process owner.	Frontline knowledge Employees who perform the work; product, customer experience, or service representatives.
Technical leadership Data, technology, and integration leaders.	Risk and governance Security, privacy, legal, or compliance representatives when relevant.

What to prepare

Bring examples of the current work, including forms, reports, documents, system screens, or process notes. Identify the tasks that consume the most time, the decisions that create uncertainty, and the business outcomes leadership wants to improve.

PRACTICAL ANSWERS

Questions business leaders ask

01 Do we need a finished AI idea? No. Bring a process, pain point, or business area. We help define whether AI fits and what the opportunity could be.	02 Does our data need to be perfect? No. We identify which information matters, what is available, and which gaps must be resolved before implementation.
03 What if AI is not the best solution? We recommend the most appropriate direction. A workflow change, system integration, interface improvement, or rules-based automation may be more effective.	04 How are timeline and price determined? They depend on the selected scope, data, systems, risk, and delivery phases. The solution specification makes these requirements visible.
05 Will automation remove people? We focus on improving tasks and decisions. Human review remains where judgment, accountability, compliance, or safety requires it.	06 How do we address security and compliance? We surface data, access, deployment, privacy, and governance requirements early so they inform the proposed solution.

NEXT STEP

Bring one important process into focus

If your organization knows where work is slowing down but has not decided how AI should help, our workshop gives your team a structured way to make that decision.

Start with one process or business area that creates recurring friction. Invite the people who manage the work and the people who perform it. We will help you examine the problem, compare the opportunities, and define a practical first build.

1	Identify	Choose a process that is repetitive, inconsistent, information-heavy, or difficult to scale.
2	Invite	Include the people who understand the process, systems, constraints, and desired outcomes.
3	Share	Bring examples that show how the work happens today and where friction appears.

Schedule an AI workshop

Talk with Idea Theorem about your organization's automation priorities and the process you want to improve.

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