

The Small Business Owner's AI Decision Guide

Worksheets and Templates

Companion download for the book by Dr. Von W. Clement

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Worksheets and Templates

This pack gathers every worksheet and template from the book in one place, in chapter order. Each one is a simple table that you can copy onto paper, into a spreadsheet or into a document.

The chapter shown after each title tells you where in the book the worksheet is explained, with a worked example.

Use them in order the first time. After that, keep your completed sheets together for each decision. They are your record of what you decided and why, and they make the next decision faster.

A1. Problem Statement Worksheet (Chapter 1)

Problem Statement Worksheet	Your answers
Date	
1. The task (precise, no tool named)	
2. Who does it	
3. How often (per day, week or month)	
4. What it costs now (hours, money, errors, delays; estimates are fine)	
5. What "better" looks like (something you could check)	
Is there a written, agreed way of doing this task? (Yes / No)	
Does one named person own it? (Yes / No)	
Is the delay or cost really here, or elsewhere? (Here / Elsewhere)	
Notes and first step	

A2. Task Fit Filter and Task Inventory (Chapter 2)

No.	Task Fit Filter question	Yes / No
1	Does the task happen at least once a week?	
2	Is it mostly words, numbers or routine information?	
3	Could you explain it to a new member of staff with a few examples and a checklist?	
4	Would saving time or improving quality on this task matter to the business?	
5	Will a named person check the output before it reaches a customer or a decision?	
6	Can it be done without putting sensitive customer or staff information into the tool, or do the tool's terms and your own promises clearly allow it?	
7	Is it free of high-stakes decisions about people and of regulated advice (legal, tax, medical or financial)?	

Task	Who does it	How often	Filter result (Good / Possible / Not for AI)	Notes

A3. One-Week Baseline Log and Baseline Summary (Chapter 3)

Day	Task	Times done	Minutes spent	Errors or rework	Quality notes (slow replies, complaints, lost enquiries)
Monday					
Tuesday					
Wednesday					
Thursday					
Friday					
Saturday					
Sunday					
Week total					

Baseline Summary	Your figure
Task	
Week logged (dates)	
Time per task	
Volume per week	
Rework or error rate	
Hourly cost (and how you chose it)	
Weekly time	
Weekly cost (time per task x volume x hourly cost)	
Quality measure 1	
Quality measure 2	
Anything unusual about the week	

A4. Requirements Checklist and AI Vendor Terms Checklist (Chapter 4)

Requirement (checkable, no product named)	Must / Should / Could	How I will check it
Fit: tools it must work with		
People: who uses it, who checks it		
Exit: export, notice, renewal		

Heading	Question	Vendor's answer	Date found
Data ownership	Who owns what I put in and what the tool produces?		
Data ownership	Can the vendor use my content for its own purposes?		
Privacy	Where is my data stored, and for how long?		
Privacy	Is my data used to train the vendor's AI? Can I switch it off?		
Cancellation	Notice period, automatic renewal and refunds?		
Cancellation	Can I export my data, and will the rest be deleted?		
Liability	What does the vendor accept if the tool is wrong, loses data or is unavailable?		
Liability	Is there a cap on what the vendor will pay?		

A5. Shortlist Log and Vendor Red Flags (Chapter 5)

Option (group and what it does)	Group (1 to 4)	Must-haves it appears to meet	Red flags found	Source and date
1.				
2.				
3.				
Set aside, and why				

Vendor red flag	Found? (Yes / No)	Notes
Vague or missing data terms		
Guaranteed results		
Pressure to commit before testing		
No clear way to cancel or export data		
No identifiable company or contact		
Answers that avoid direct questions		
Asks for your own password, wants to build in their own accounts, or will not sign a confidentiality agreement		

A6. AI Tool Scorecard (Chapter 6)

Weighted score: multiply each score by its weight, add the results and divide by 100. Apply the knock-out rule before comparing totals.

Criterion	Weight (%)	Minimum score	Option 1	Option 2	Option 3
Fit to the problem					
Ease of use					
Total cost					
Data and privacy					
Fit with existing tools					
Vendor support and stability					
Ease of exit					
Weighted score	100				
Below a minimum?					
Tie-break rule (write before scoring)					
Date weights were set					

A7. Total Cost Worksheet (Chapter 7)

Cost item	How to work it out	Option 1	Option 2
Subscription	Monthly price x number of users x 12		
Usage beyond the allowance	Extra charge x expected extra use x 12		
Add-ons	Monthly price of each add-on you need x 12		
Setup time (one-off)	Hours x hourly cost		
Learning time (one-off)	Hours per person x people x hourly cost		
Review and correction	Minutes per item x items a month / 60 x hourly cost x 12		
Integration work or outside help	Quoted price, or hours x hourly cost		
Sales tax or VAT (if it applies)	As shown at the point of purchase		
12-month total	Add the rows above		
Cost of switching later (note only)	Hours to export, set up again and retrain x hourly cost		
Date prices checked			

A8. Return Estimate Worksheet (Chapter 8)

Return Estimate	Cautious	Likely	Hopeful
Baseline hours a month (Chapter 3)			
Review time a month			
Hours still spent doing the task by hand			
Hours a month with the tool (review + by hand)			
Net hours saved a month			
Value of time saved, 12 months (net hours x 12 x hourly cost)			
Cash and one-off costs, 12 months (Chapter 7, excluding review)			
Estimated return, 12 months			
Break-even line (costs / 12 / hourly cost)			
Above the break-even line?			
Non-money returns and how each will be observed			
What the time saved will be used for			
Reasoning for each case (from Chapter 6 tests)			

A9. 30-Day Pilot Plan and Weekly Check-in Log (Chapter 9)

30-Day Pilot Plan	Your plan (complete before day one)
Task	
Pilot owner and users	
Dates (start, end, trial end, renewal)	
Success criteria: time	
Success criteria: quality	
Success criteria: errors	
Success criteria: people	
What would count as failure	
Guardrails: data, review, scope, escalation	

Weekly Check-in Log	Week 1	Week 2	Week 3	Week 4
Times the task was done				
Outputs usable after a quick check				
Average review time per item				
Hours spent on the task (review + by hand)				
Hours saved against baseline				
Errors caught in review / reaching customers				
Quality measure				
Users' comments				
Warning signs noted				
Adjustments made				

A10. Decision Record (Chapter 10)

Decision Record	Your entry
Task	
Tool and pilot dates	
Result: time	
Result: quality	
Result: errors	
Result: people	
Decision (keep, change or stop)	
Reasons	
Next steps, by when and who	
Vendor terms re-read (date)	
Next review date	
Decided by	

A11. 15-Minute Tool Re-check Checklist (Chapter 11)

Minutes	What to check
0 to 3	Pricing page. Find the plan that meets all your must-haves. Note the price, whether it is per user, monthly or annual, and whether it is a time-limited offer. Write down the date.
3 to 7	Privacy or data page. On your plan: is your information used to train the AI? Is there a setting to switch that off? How long is data kept, and how do you delete it?
7 to 10	Terms of service. How do you cancel? Does the plan renew automatically? How much notice is given before a price change?
10 to 13	What has changed. Look for recent announcements: new features, retired plans, changed limits or new terms since you last looked.
13 to 15	Record it. Add what you found, with the date and the page address, to your Shortlist Log from Chapter 5.

A12. One-Page AI Use Policy (Chapter 12)

This template is general information, not legal advice. Rules differ by country and change over time. For decisions that matter, check the official source or speak to a qualified professional.

One-Page AI Use Policy (template)	Your entry
Business name	
Approved tools, and the plan or account to use	Business accounts only, not personal ones
Approved uses	
Information that must never go into an AI tool	For example: payment details, identity numbers, health information, anything told in confidence
Review rule: what must be checked, and by whom	Every output that reaches a customer or informs a decision is checked by a named person first
Who to ask, and how to report a problem	
Date agreed	
Next review date	
Agreed by	

A13. Decision Cycle Summary Card (Chapter 12)

Step	Question	Chapter	Worksheet
1	What problem am I solving?	1	Problem Statement Worksheet
2	Is AI the right fix for this task?	2	Task Inventory and Task Fit Filter
3	How does the task run today?	3	One-Week Baseline Log
4	What must a tool do, and what terms protect me?	4	Requirements Checklist; AI Vendor Terms Checklist
5	What are my options?	5	Shortlist Log and Vendor Red Flags
6	Which option fits best?	6	AI Tool Scorecard
7	What will it really cost?	7	Total Cost Worksheet
8	What could it give back?	8	Return Estimate Worksheet
9	Does it work in practice?	9	30-Day Pilot Plan and Weekly Check-in Log
10	Keep, change or stop?	10	Decision Record
11	Is it still right?	11, 12	15-Minute Tool Re-check; AI Use Policy