

AI TRANSFORMATION PARTNER

How We Prioritize Your *AI Opportunities*

You probably have ten AI ideas floating around the business and one that's actually worth doing first. Guessing wrong is expensive — in build-days, in stalled pilots, and in your team's patience for trying again. Here is exactly how we decide.

OFFER 1 · S1 IN THE WINSYM METHOD

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We start with an audit, not a pitch.

WHY THIS MATTERS

Ten ideas. One right first move.

Almost every leadership team we sit down with has the same problem — not a shortage of AI ideas, but too many of them, with no shared way to compare a document-heavy back-office fix against a customer-facing chatbot against a forecasting model.

Pick the wrong one first and the cost isn't just the build budget. It's the three months your team spent on something that never reached production, the trust you spend convincing skeptics to try again, and the quiet conclusion that **"AI doesn't really work here."**

**AI makes your people more valuable — *not replaceable*.
But only if we start with the right problem.**

THE STARTING POINT FOR EVERY WINSYM.AI ENGAGEMENT

So before we build anything, we score every candidate opportunity against the same set of lenses, in the open, with your team in the room. This document explains exactly how that works — no black box, no internal formulas you have to take on faith.

THE INSTRUMENT

Six lenses, every idea

Every opportunity we surface during your audit — whether it came from a leadership interview or a frontline employee describing yesterday's most annoying task — gets scored against the same six lenses. Same questions, same standard, no favorites.

LENS 1

Value

How much time or money does this actually leak per year — in hours, errors, delays, or missed revenue? We size this from real numbers where we can get them, not guesses.

LENS 2

Data access

Can we actually get to the information this needs — the CRM export, the spreadsheet, the shared drive — or does it live in someone's inbox and someone's head?

LENS 3

Data readiness

Once we can access it, is it usable? Structured, consistent, and clean enough to build on — or does it need cleanup work before anything else can happen?

LENS 4

Effort

How much build time does this realistically take — days, not months — including the integration work, not just the demo version.

LENS 5

Fit for a fast pilot

Can we prove this works in weeks, on a contained slice of the process, before asking you to commit to the full rollout?

LENS 6

Measurability

Once it's live, can we point to a number and say it moved — hours saved, turnaround time, error rate — or will "success" stay a feeling?

No opportunity scores well on all six. That's expected. The point isn't to find a perfect idea — it's to see clearly which trade-offs each idea asks you to make, side by side, so the choice is a judgment call your team makes with full information, not ours to make quietly on your behalf.

HOW IT RUNS

Decided with you, not for you

Prioritization isn't something we do behind closed doors and hand you as a finished ranking. It happens in a working session with your team, during the audit — because the people who live inside these workflows every day catch things a two-week engagement never will.

1

We bring the draft

Every candidate opportunity we found, scored against the six lenses from what we saw in interviews, workflow shadowing, and the data we could access.

2

Your team pressure-tests it

Leadership and the people doing the work sit in the same room. If finance thinks an idea is riskier than we scored it, or ops knows a workaround that changes the effort estimate — that surfaces here, out loud.

3

Disagreement gets discussed, not smoothed over

When the owner's gut says one thing and the frontline team says another, we don't average it away. We name the disagreement and resolve it with evidence, live.

4

We co-edit the ranking

The matrix that leaves the room reflects what your team actually knows about the business — not just what a two-week outsider observed.

WHY THIS MATTERS

A roadmap your team helped build is a roadmap your team defends when it gets hard. A roadmap handed down from a slide deck is the first thing that gets quietly deprioritized.

ILLUSTRATIVE

Three ideas, ranked

This is an anonymized, invented example — built to show the shape of the output, not a real client's numbers. A distribution business we'll call the pattern for came to their prioritization session with three candidate ideas.

CANDIDATE IDEA	VALUE	DATA READINESS	EFFORT	FAST-PILOT FIT	VERDICT
Automated invoice matching	High	Ready now	Low	Strong	<i>Quick Win</i> — build first
Customer support assistant	Medium	Needs cleanup	Medium	Moderate	Sequence behind Win #1
Demand forecasting model	High	Not ready	High	Weak	Foundation work required first

The forecasting idea had the biggest number attached to it in the room — and it was still ranked last. Not because it wasn't valuable, but because the data behind it wasn't clean enough yet, and a 12-week build with no fast proof point is the wrong place to spend a client's first trust in AI. *Invoice matching* won because it scored well everywhere at once: real leak, accessible data, low effort, provable in weeks.

- **Quick Wins** score well across most lenses — these move first, and they build the internal proof that makes the bigger swings easier to greenlight.
- **Big Swings** carry real value but need groundwork first — sequenced, not shelved.

AFTER THE SESSION

From ranking to roadmap

The prioritized list isn't the end product — it's the input to the next two things you actually take away from an audit.

THE TOP 1-3 IDEAS

Become your Transformation Roadmap

Sequenced, scoped, and presented in the executive readout alongside the size of the opportunity behind each one — so leadership sees not just what to build, but why it's first.

THE HIGHEST-RANKED IDEA

Becomes a live Build proposal

Presented in the room at the end of the audit, not emailed cold days later. If you proceed within 60 days, your audit fee credits in full toward the Build.

Everything below the top few doesn't disappear — it stays on record as a validated future opportunity, ready to pick up once the first Build has proven the model and freed up bandwidth for the next one.

NEXT STEP

Find your one *right move.*

If you haven't started an Audit yet, this is where that first ranked list comes from. Two weeks, your team in the room for the decision, and a Transformation Roadmap built on evidence instead of whoever argued loudest in the last strategy meeting.

We don't sell AI tools. We own the outcome. The Audit is how we prove, together, which idea earns your team's time first.

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