

# TOOL #14

## **AI COST-BENEFIT**

# ANALYSIS AND BUDGETING TOOL

# AI Cost-Benefit Analysis and Budgeting Tool

## Section 1: Initial Cost Analysis

| One-Time Costs        |                             |    |
|-----------------------|-----------------------------|----|
|                       | Software/Platform Licenses: | \$ |
|                       | Initial Training:           | \$ |
|                       | Setup/Integration:          | \$ |
|                       | Data Preparation:           | \$ |
|                       | Documentation:              | \$ |
| Total One-Time Costs: |                             | \$ |

| Monthly Recurring Costs |                         |    |
|-------------------------|-------------------------|----|
|                         | Software Subscriptions: | \$ |
|                         | Maintenance:            | \$ |
|                         | Ongoing Training:       | \$ |
|                         | Support Services:       | \$ |
|                         | Data Storage:           | \$ |
| Total Monthly Costs:    |                         | \$ |

| Annual Cost Projection   |                         |    |
|--------------------------|-------------------------|----|
|                          | One-Time Costs:         | \$ |
|                          | + (Monthly Costs × 12): | \$ |
| = Total First Year Cost: |                         | \$ |

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## Section 2: Direct Benefits Analysis

| One-Time Costs                        |  |    |
|---------------------------------------|--|----|
|                                       | <b>Labor Cost Savings:</b><br>Hours saved × Average hourly rate            | \$ |
|                                       | <b>Error Reduction Savings:</b><br>Reduced errors × Average cost per error | \$ |
|                                       | <b>Process Efficiency Gains:</b><br>Time saved × Value per hour            | \$ |
|                                       | <b>Quality Improvement Value:</b><br>Reduced waste/rework costs            | \$ |
| <b>Total Monthly Direct Benefits:</b> |  | \$ |

| Annual Direct Benefit Projection |                              |    |
|----------------------------------|------------------------------|----|
|                                  | <b>Monthly Benefits × 12</b> | \$ |

## Section 3: Indirect Benefits Valuation

| Customer Impact               |  |    |
|-------------------------------|--|----|
|                               | <b>Improved Satisfaction:</b><br>Retained customers × Average customer value       | \$ |
|                               | <b>Faster Response Time:</b><br>Additional customers served × Average value        | \$ |
|                               | <b>Better Service Quality:</b><br>Increased referrals × Customer acquisition value | \$ |
| <b>Total Customer Impact:</b> |  | \$ |

| Operational Benefits               |   |    |
|------------------------------------|---|----|
|                                    | <b>Enhanced Decision Making:</b><br>Better outcomes × Average value | \$ |
|                                    | <b>Innovation Capacity:</b><br>New opportunities × Potential value  | \$ |
|                                    | <b>Team Productivity:</b><br>Increased output × Value per unit      | \$ |
| <b>Total Operational Benefits:</b> |   | \$ |

## Section 4: ROI Calculation

| First Year ROI         |                                    |    |
|------------------------|------------------------------------|----|
|                        | <b>Total Benefits:</b>             | \$ |
|                        | <b>- Direct Benefits (Annual):</b> | \$ |
|                        | <b>- Indirect Benefits:</b>        | \$ |
| <b>Total Benefits:</b> |                                    | \$ |

| Total Costs:           |                                  |    |
|------------------------|----------------------------------|----|
|                        | <b>- One-Time Costs:</b>         | \$ |
|                        | <b>- Annual Recurring Costs:</b> | \$ |
| <b>Total Benefits:</b> |                                  | \$ |

|  |   |   |
|--|---|---|
|  | <b>ROI = ((Total Benefits - Total Costs) / Total Costs) × 100 =</b> | % |
|--|---|---|



## Section 5: Break-Even Analysis

| Monthly Cost: |                         |    |
|---------------|-------------------------|----|
|               | ÷ Monthly Benefits:     | \$ |
|               | = Months to Break Even: |    |

## Section 6: Implementation Budget Planning

| Phase 1: Foundation (Months 1-3) |                       |    |
|----------------------------------|-----------------------|----|
|                                  | Initial Software:     | \$ |
|                                  | Basic Training:       | \$ |
|                                  | Essential Setup:      | \$ |
|                                  | Total Phase 1 Budget: | \$ |

| Phase 2: Expansion (Months 4-6) |                       |    |
|---------------------------------|-----------------------|----|
|                                 | Additional Features:  | \$ |
|                                 | Advanced Training:    | \$ |
|                                 | Integration Work:     | \$ |
|                                 | Total Phase 2 Budget: | \$ |

| Phase 3: Optimization (Months 7-12) |                       |    |
|-------------------------------------|-----------------------|----|
|                                     | Performance Tuning:   | \$ |
|                                     | Team Development:     | \$ |
|                                     | System Enhancement:   | \$ |
|                                     | Total Phase 3 Budget: | \$ |

## Section 7: Success Metrics Tracking

| Phase 1: Foundation (Months 1-3) |                   |    |
|----------------------------------|-------------------|----|
|                                  | Efficiency Gains: | %  |
|                                  | Basic Training:   | %  |
|                                  | Cost Savings:     | \$ |
|                                  | Revenue Impact:   | \$ |

| Quarterly Business Impact |                        |   |
|---------------------------|------------------------|---|
|                           | Customer Satisfaction: | % |
|                           | Team Productivity:     | % |
|                           | Market Position:       |   |
|                           | Innovation Rate:       |   |

## Section 8: Risk Mitigation Budget

| Contingency Planning |                         |    |
|----------------------|-------------------------|----|
|                      | Technical Issues:       | \$ |
|                      | Training Needs:         | \$ |
|                      | - Integration Problems: | \$ |
|                      | Total Risk Budget:      | \$ |

### Instructions for Use:

- ☐ Complete each section systematically
- ☐ Use actual data whenever possible
- ☐ Update monthly during implementation
- ☐ Review quarterly for accuracy
- ☐ Adjust projections based on results

### Common Pitfalls to Avoid:

- ☐ Underestimating training costs
- ☐ Overlooking integration expenses
- ☐ Missing indirect benefits
- ☐ Unrealistic time frames
- ☐ Insufficient risk budgeting

Remember: This tool helps track both quantitative and qualitative benefits. Update regularly as your implementation progresses.

Need help calculating your AI ROI? **Book a GROWTH Session at [AIGrowthCode.com](https://aigrowthcode.com)**

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