

8 WEST IMPACT ENGAGEMENTS

AI Use Case Workshop

**BUSINESS WORKFLOW DISCOVERY AND
IMPLEMENTATION ROADMAP**

4+1 Days | 8-20 Participants | Virtual or On-Site
Fixed-Fee Engagement [\$20,000]



Workshop Overview

8 West Consulting's AI Use Case Workshop is a fixed-scope, high-impact engagement designed to help business and technology leaders identify, qualify, and prioritise AI opportunities across real operational workflows.

It is business-first. We start with how work gets done today, then determine where AI can replace, enhance, or augment the workflow in a safe and measurable way.

In a short, structured window, we will:

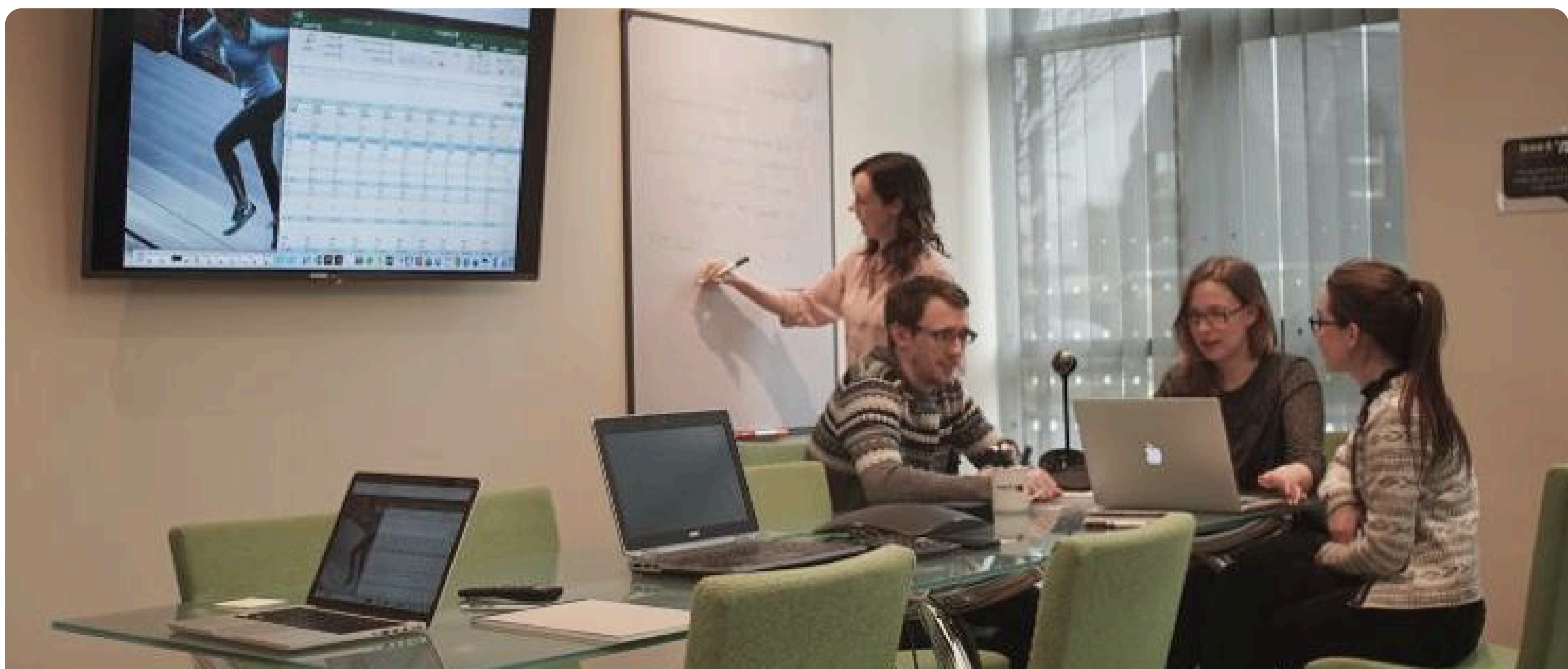


- Review current workflows, pain points, and operational constraints.
- Rapidly assess candidate use cases using a consistent scoring rubric. Value, feasibility, risk, and data readiness.
- Refine the strongest use cases into clear problem statements and solution approaches.
- Define an implementation roadmap. Quick wins, pilots, and scale-up initiatives.
- Create an executive-ready readout and a decision trail that helps maintain momentum.

How the Workshop Works

The engagement includes a fixed block of expert time. You can bring any number of candidate use cases. We will work through them until the scheduled time is exhausted. Access to senior experts is guaranteed during the workshop sessions.

If the workshop identifies high-value opportunities that need rapid execution support, we can provide a forward deployed specialist AI squad as an optional extension. This helps move from roadmap to real delivery without losing momentum.



Common Starting Points

- There are many AI ideas, but no agreed way to prioritise them.
- Teams struggle to connect AI initiatives to measurable business outcomes.
- Workflows are document-heavy, manual, and slow, but no one knows where to start.
- Data quality, privacy, or regulatory constraints make teams cautious.
- Leaders want pilots that show value fast, without creating operational risk.

Workshop Outcomes

OUTCOME	WHAT YOU GET
Use Case Inventory and Prioritisation	A structured backlog of reviewed use cases with scoring and rationale. Includes a prioritisation matrix to support decision-making.
Workflow Maps and Pain Point Analysis	Clear snapshots of current workflows, where time is spent, and where errors or delays occur. Highlights what should change, and what should not.
AI Suitability and Risk Assessment	A practical view of where AI is appropriate. Augmentation vs automation decisions, plus key risks. Data sensitivity, compliance, and operational failure modes.
Solution Archetype Recommendations	Recommended solution patterns for each shortlisted use case. Examples include knowledge assistants, document processing, classification and routing, agent-assisted workflows, and analytics acceleration.
Pilot Plan and Success Metrics	A defined pilot. Scope, stakeholders, success measures, acceptance criteria, and how results will be evaluated.
Implementation Roadmap and Executive Readout	A phased plan. Quick wins, pilots, scale-up. Includes an executive-ready narrative to align leadership and secure sponsorship.
Forward Deployed AI Squad Recommendation	A clear recommendation on whether a forward deployed specialist AI squad is appropriate for your organisation, and if so, what the squad would do. Scope, roles, engagement length, and outcomes. Designed to accelerate pilots into production safely.

Who Should Attend

This engagement works best with a cross-functional group that owns the workflows, data, and delivery capability needed to act on outcomes.

ROLE	WHY THEY'RE CRITICAL
Executive Sponsor [COO, CIO, Head of Ops, Head of Product]	Confirms objectives, removes blockers, and sponsors prioritised initiatives.
Business Process Owners	Explain how work is done today, where the pain is, and what success looks like.
Functional Leads [Customer Service, Finance, Sales, Claims, HR]	Bring domain insight and ensure use cases map to real operational value.
Data Owner or Analytics Lead	Clarifies data sources, quality constraints, and measurement options.
Enterprise or Solution Architect	Validates feasibility, integration constraints, and target-state alignment.
Security, Risk, or Compliance Lead	Defines non-negotiables for data handling, auditability, and safe deployment.
IT or Platform Lead	Advises on tooling, access patterns, identity, and operational support model.
Change and Enablement Lead	Anticipates adoption risks and helps plan training and communications.

Recommended group size:

8 to 20 participants, with a smaller core decision team for follow-up actions.

Activities & Agenda

PRE-ENGAGEMENT ALIGNMENT

Brief executive and key stakeholder kick-off to align on outcomes, success criteria, expectations, and communication plan before Day 1.

DAY 1 KICK-OFF & ALIGNMENT

FOCUS

Objectives, scope boundaries, and evaluation criteria.

KEY ACTIVITIES

- Confirm business objectives, constraints, and decision-makers.
 - Agree how success will be measured. Cost, cycle time, quality, risk reduction, customer impact.
 - Introduce the AI suitability rubric and use case canvas.
 - Build an initial inventory of workflows and candidate use cases.
 - Pre-select the first set of use cases for Day 2 and Day 3 clinic sessions.
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DAY 2 USE CASE CLINICS AND WORKFLOW DEEP DIVES - PART 1

FOCUS

Rapid review of business workflows and use cases, with expert facilitation.

KEY ACTIVITIES

- Run a series of use case clinic sessions. Stakeholders bring workflows and examples.
 - Capture current process, inputs and outputs, systems involved, and pain points.
 - Identify the best AI intervention type. Automate, augment, or enhance.
 - Flag data constraints, security considerations, and change impacts early.
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Activities & Agenda Continued...

DAY 3 USE CASE CLINICS AND WORKFLOW DEEP DIVES - PART 2

FOCUS

Continue clinics.
Begin scoring and shortlisting.

KEY ACTIVITIES

- Continue reviewing additional use cases. Prioritise breadth, then depth on the best candidates.
- Score use cases consistently across value, feasibility, risk, and data readiness.
- Identify quick wins and candidates for pilot delivery.
- Draft success metrics and acceptance criteria for the top opportunities.

DAY 4 ANALYSIS AND ROADMAP DEVELOPMENT

FOCUS

Offline consultant work with a short alignment checkpoint.

KEY ACTIVITIES

- Synthesize workshop inputs. Consolidate and normalise the use case inventory.
- Group use cases into themes and solution archetypes.
- Draft a phased roadmap and an initial pilot plan.
- Create executive-ready artefacts. Prioritisation matrix, recommended next steps, and risks.

(2 WEEKS LATER)

DAY 5 FINAL REPORT DELIVERY AND EXECUTIVE READOUT

FOCUS

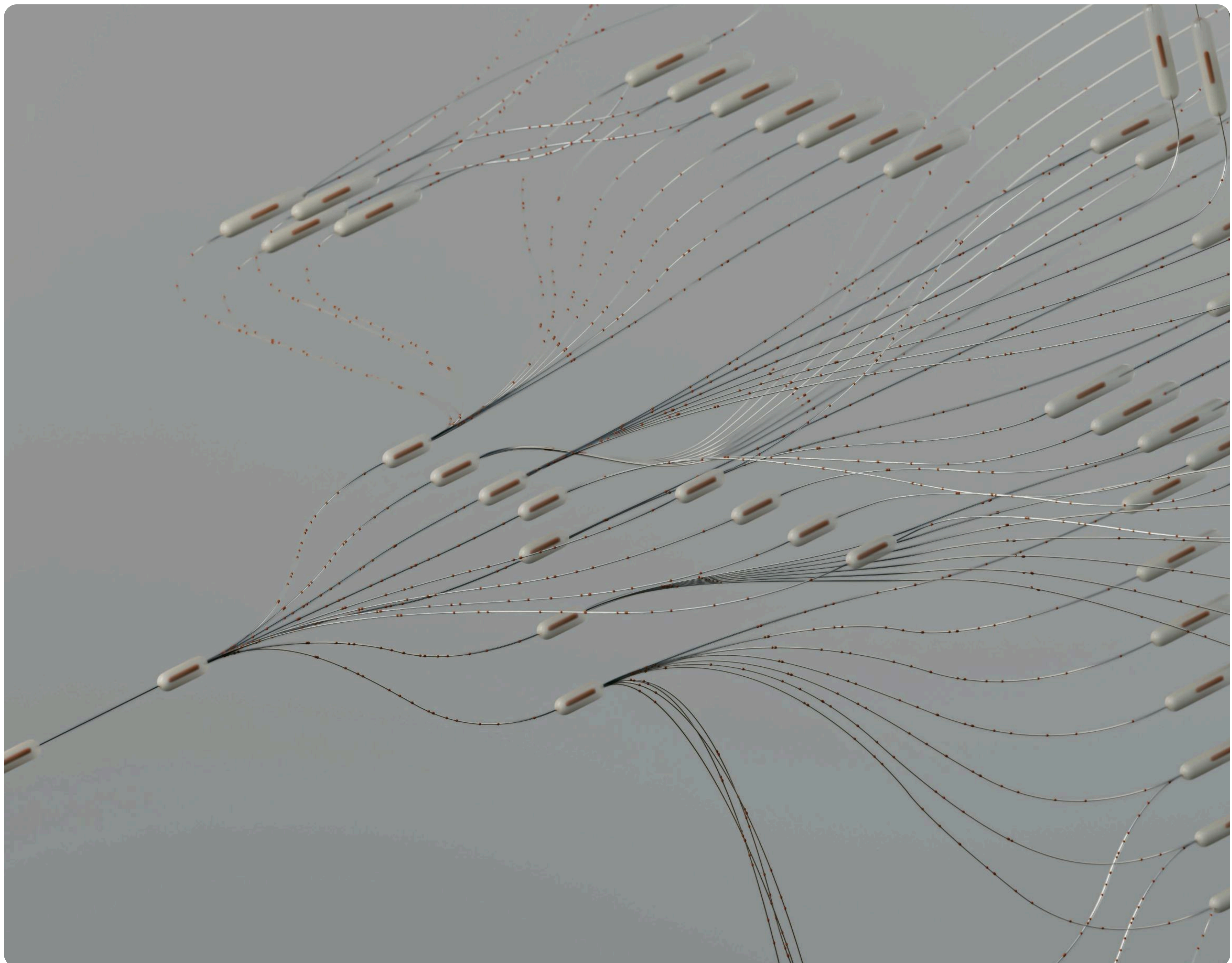
Present the roadmap, secure alignment, and confirm next steps.

KEY ACTIVITIES

- Deliver the final use case backlog, prioritisation, and implementation roadmap.
- Present to senior leadership. Clarify decisions and trade-offs.
- Confirm pilot ownership, timeline, and resourcing.
- Provide communication support to maintain momentum.

Workflow Categories We Commonly Assess

- Document-heavy processes. Intake, triage, summarisation, and decision support.
- Customer service operations. Agent assist, knowledge retrieval, and case routing.
- Sales and account workflows. Proposal drafting, research, and CRM hygiene.
- Finance operations. Invoice processing, reconciliations, and exception handling.
- Risk and compliance workflows. Evidence capture, audit preparation, and policy Q&A.
- Internal knowledge. Search, onboarding, and standard operating procedure navigation.



Engagement Model & Pricing



FIXED FEE

Fixed scope and deliverables agreed up-front. Includes 4 delivery days plus a final executive readout.

\$20,000 fixed-fee engagement for one business unit, function, or product line.



VALUE-FOCUSED

We focus on real workflows and measurable outcomes, not generic AI theory. The aim is a clear, defensible shortlist and a plan your organisation can execute.



NO SURPRISES

Clear schedule, participant list, and workshop cadence. Use cases are reviewed within the fixed time window. Decisions and assumptions are documented.



FLEXIBLE SCALING

Optional add-ons include pilot delivery support, vendor evaluation, data readiness deep dives, governance and policy support, and change management assistance.

A common follow-on is a forward deployed specialist AI squad. This is a small, experienced team embedded with your stakeholders to validate designs, build pilots, and harden solutions for real operations and governance.

Delivery Format

- + Virtual-First** Delivered via secure video sessions and shared documentation.
- + On-Site Option** Ideal for high-stakes workshops or executive alignment.
- + Flexible Scheduling** Four-day agenda can run consecutively or spread across two to three weeks.
- + Digital Deliverables** Use case backlog, roadmap slides, and executive summary.
- + Follow-Up Readout** Final executive briefing two weeks after initial workshops.



Client Success Metrics



- + A ranked shortlist of AI use cases approved by leadership, with clear rationale.**
- + At least one pilot scoped with owners, success measures, and acceptance criteria.**
- + Reduced time spent on low-value manual work for the targeted workflows.**
- + Clear guardrails for data handling, privacy, and risk.**
- + A realistic roadmap that matches delivery capacity and change tolerance.**

Why 8 West

8 West helps enterprise organisations adopt new capabilities in ways that work in the real world. We combine business process clarity with delivery pragmatism, so teams can move from ideas to execution.

We bring hands-on experience designing and delivering AI-enabled workflows, including secure patterns that align with ISO 27001 expectations. Where appropriate, we can translate shortlisted use cases into implementation-ready plans that fit your governance model.

Our approach is tool-agnostic. We help you choose what fits, then tailor it to your constraints, culture, and risk posture.

What We Will Ask For Before Day One

- A shortlist of key workflows you want to improve, plus the stakeholders who own them.
- Any existing process documentation, SOPs, forms, templates, or example artefacts.
- A view of the systems involved. Data sources, operational tools, and handoffs.
- Any constraints on data classification, third-party tools, and regulatory requirements.
- Current KPIs or baseline measures for the workflows. Cycle times, costs, error rates, or satisfaction metrics.
- A point of contact for scheduling clinic sessions and coordinating participants.

Deliverables at-a-Glance

INCLUDED DELIVERABLES

- + Use case inventory with scoring, rationale, and assumptions.
- + AI Use Case Canvas for shortlisted opportunities.
- + Prioritisation matrix and theme grouping.
- + Risk and suitability notes. Data sensitivity, control points, and operational considerations.
- + Pilot plan for one to two top use cases. Scope, metrics, owners, and next steps.



- + Implementation roadmap. Quick wins, pilots, scale-up initiatives.
- + Leadership-ready readout deck and executive summary.

OPTIONAL ADD-ONS

- Pilot implementation support with your team on one shortlisted use case.
- Vendor and platform evaluation. Build vs buy guidance and procurement support.
- Data readiness and governance deep dive for high-value workflows.
- Security and policy pack for acceptable use, data handling, and audit evidence.
- Change management support. Communications, training plan, and adoption playbook.
- Ongoing coaching for 4 to 8 weeks to support delivery momentum.
- Forward deployed specialist AI squad. 4 to 12 weeks embedded delivery to take one or more use cases from pilot to production.

Ready to Proceed?

We'll schedule a complimentary discovery call to confirm objectives, participants, and the workshop format. From there we will finalise timing and kick-off, typically ready to begin within 2 to 4 weeks of approval.



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