

Staff AI Opportunities Intro (for employees)

You can use this as the intro page or preamble to the questionnaire.

How AI Can Actually Help You (Not Replace You)

Why you're getting this

We're exploring new ways to use AI in our organization—not just as a writing tool (like ChatGPT), but as a way to:

- Take repetitive work off your plate
- Fix recurring issues that waste everyone's time
- Make it easier to help our clients, patients, and customers
- Give you more time for the important, skilled parts of your job
- Follow up better on people who actually need our services

You're getting this because you see things every day that leadership can't see from a dashboard or a meeting. You know:

- Where the work really gets stuck
- Which tasks feel like a waste of your skills
- Which issues keep coming back
- Where clients/patients/customers get frustrated
- Where we quietly miss opportunities to help people or grow revenue

We want your help spotting the best opportunities for AI to make your work easier and our organization stronger.

What we mean by "AI" (beyond ChatGPT)

When many people think of AI, they think of ChatGPT writing an email or an AI tool cleaning up wording or summarizing a document. That's useful, but we're looking beyond that.

We're interested in SMART AI Agents – AI assistants that can:

- Understand what someone is asking for
- Look up information in our systems (within strict permissions)
- Follow rules and workflows we define
- Take actions like filling in fields, creating tickets, sending updates, scheduling, or drafting notes for you to review

Think less "chatbot that just talks" and more: "A very fast, very consistent junior assistant that handles the boring and repetitive parts and never gets tired."

Examples of the kinds of help AI could provide

Here are some concrete examples to get you thinking before you answer the questions.

Operations / Support:

- An AI assistant that answers the phone or chat first, gathers key details, pulls up history.
- Creates a clean ticket so you can focus on solving, not collecting info.
- Suggests likely solutions from past cases or knowledge bases.

Healthcare:

- An AI helper that sends reminders and confirmations for appointments.
- Contacts patients who are overdue for annual checkups, lab work, or vaccines.
- Drafts visit summaries and patient instructions for clinician review.

Legal:

- An AI helper that guides potential clients through an intake process and organizes key facts.
- Sends follow-ups to leads who asked for information but haven't booked a consult.
- Drafts initial case summaries or timelines for attorney review.

Financial services & insurance:

- An AI helper that reminds clients about policy or portfolio reviews.
- Flags clients who might benefit from a specific product or coverage change.
- Summarizes conversations and updates records after calls.

SaaS / hardware / software providers:

- An AI helper that follows up with new trial users to offer help or a demo.
- Reminds customers about renewals and checks for expansion opportunities.
- Answers repetitive "how do I...?" questions and suggests next best actions.

You don't have to know how to build any of this. You just have to be honest about what slows you down, what feels repetitive, where we drop the ball with clients/patients/customers, and where you wish you had a smart assistant by your side.

How your input will be used

We'll review all responses and look for:

- High-impact repetitive tasks AI could help with
- Recurring issues we might be able to fix permanently
- Pain points for clients/patients/customers we can reduce
- Missed opportunities for follow-up, outreach, or revenue

From there, we'll:

- Choose a small number of pilot AI projects.

- Prioritize ideas that save real time, reduce frustration, improve service and outcomes, and are safe and realistic to implement.

Some of the best ideas may come from roles that rarely get asked these questions. That's why your input matters so much.

A quick word about jobs and privacy

We know there are two big concerns:

1. "Is this going to replace me?"

Our goal is to target tasks, not people—especially repetitive work that doesn't really need your level of skill. We want you spending more time on the parts of the job that require judgment, empathy, and experience.

2. "Is this safe for our data and our clients/patients/customers?"

We are not asking you to paste sensitive data into tools like public ChatGPT. Please do not include specific client/patient names, IDs, medical details, or financial account numbers in your answers. Any AI solutions we implement will be designed with governance, privacy, and compliance in mind.

Your honest answers will help us design AI solutions that make your workday better, improve our service, and respect the trust our clients/patients/customers place in us. Thank you for taking the time to fill this out thoughtfully.

Staff AI Opportunities Questionnaire

You can turn this into an online form or a printable handout.

Staff AI Opportunities Questionnaire

You can answer briefly or in detail—whatever feels natural. Examples are welcome.

1. List 3 tasks you do every week that feel repetitive and low-value.
(Examples: re-entering the same data in multiple systems, answering the same question repeatedly, chasing the same missing information.)
2. If you had an assistant, what tasks would you give them first?
(Think about things that don't really need your level of skill or experience.)
3. What tasks in your role require a lot of data analysis or digging through information that you think AI would be great for?
(Examples: pulling reports, comparing documents, searching across multiple systems, building lists.)
4. How long does each of those tasks typically take you, on average?
(Estimate in minutes per task and how many times per week or month you do them.)
 - Task A – approx. time + frequency:
 - Task B – approx. time + frequency:
 - Task C – approx. time + frequency:
5. Which recurring issues do you wish we could fix “once and for all”?
(Things that keep coming back and feel like a waste of everyone's time.)
6. Where do you feel our clients/patients/customers experience the most friction?
(Examples: long waits for answers, repeating information, confusing instructions, unclear status updates.)
7. Where do you see us missing revenue or important opportunities because we don't have time?
(Examples: leads nobody follows up with, patients who don't get reminders, clients who never hear about relevant services.)
8. Optional: If you could design an AI assistant for your role, what would you ask it to do?
(Imagine a SMART AI Agent working alongside you. How would it help you do your best work?)

Confidentiality & Data Use (example text for the form)

Your responses will be used solely to help our organization and our AI partners identify opportunities to improve workflows, service, and growth. Please do not include sensitive client/patient information (names, IDs, dates of birth, medical details, financial account numbers, etc.) in your answers. Individual responses may be reviewed by project leads. In

summaries and reports, we will focus on themes and anonymized examples rather than attributing comments by name, unless you explicitly authorize otherwise.