



AI DISCOVERY SESSION · EXAMPLE

Where AI can pay off first — and what is in the way.

What a leadership team sees from a Discovery Session: the short pre-work questionnaire, and the brief we build from it before the 60-minute workshop.

Illustrative example. Karoo Logistics is a fictional cold-chain operator. Every answer, figure and quote in this document is invented, to show the format — no client information is included.

01

The pre-work

Screens from the 12-15 minute questionnaire one person completes.

02

The brief

Four pages: at a glance, where the time goes, readiness, AI already in use.

03

Your next step

How to get the same brief for your own business.

STEP 1 · ONE WEEK BEFORE THE WORKSHOP

A short questionnaire, answered in one sitting.

One person spends 12–15 minutes: the business's priorities, the 3–6 tasks that eat the most time, the AI already in use, and 40 quick readiness statements across ten areas. Estimates are fine; roles, not names.

Pre-work · Part 1 · Your business

Part 1 · Your business

0 of 40 statements

Part 1 · YOUR BUSINESS

A

Priorities & time-consuming work

Part 2 · AI TODAY

B

What is already in use

C

What you are seeing

Part 3 · DIRECTION

1

A clear business reason for AI

2

An honest view of our starting point

3

A short list of funded priorities

Part 3 · CONTROL

4

Known costs and proof it works

5

Simple rules for safe use

6

Control of our data and suppliers

7

Someone coordinating AI

Part 3 · SCALE

8

Targets updated for AI

9

People brought along

SHOW REVENUE OR WITHOUT WORK

REVENUE: OPERATING COST

☒ Serve customers faster or better

☒ Free up staff capacity without hiring

☐ Reduce errors and rework

☒ Stay compliant and manage risk

☐ Faster reporting and decisions

☐ Keep and develop good people

The one business number leadership watches most (optional)

Rough cost of one hour of staff time, salary plus overheads

e.g. Quote-to-order conversion, cost per shipmen

R200 – R400 an hour

Only used to put a rand figure on the hours you list below.

Which tasks eat the most time?

List 3 to 6 — routine, repetitive, or frustrating work. Think quotes, reports, admin, reconciliations, emails, checking documents. Whole-team hours, your best guess.

TASK 1

Remove

What is the task or process?

Which team does it?

Building temperature-log and POD packs for client audits

Depot admin

Hours per week, whole team

How often does it happen?

Who is involved?

20

Daily

Passes between teams or

How repeatable is it?

Where does the information live?

Same steps every time

Mostly in one system

What goes wrong or frustrates people? (optional)

Part 1 — Your business. Priorities, the cost of an hour of staff time, and each time-consuming task: hours, frequency, who is involved, how repeatable, where the information lives.

Pre-work · Part 3 · Readiness · Step 4 of 10

Proven Path Professionals

AI DISCOVERY SESSION · PRE-WORK · PPP-AID-002 V3

Part 3 · Step 4 of 10

2 of 40 statements

Part 1 · YOUR BUSINESS

A

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CONTROL

Control · Steps 4–7 · Are the rules in place before the spend?

4 Known costs and proof it works

Proven Path step 4 · Cost and prove the bets

If you cannot say what it costs and when you would stop, you cannot defend it — or stop it.

4.1 Each AI project has a 12-month cost estimate that covers more than licences (people, data, integration, support).

0 Not started

1 Talked about

2 Partly in place

3 Done and current

Add a note (optional)

4.2 Before trusting an AI tool, we test it against real examples from our own work.

0 Not started

1 Talked about

2 Partly in place

3 Done and current

Add a note (optional)

4.3 Each project has a written 'stop' point (a cost or error level) and a named person who may

Part 3 — Readiness. Four statements per area, each tied to something concrete, scored on one scale:

0 Not started

1 Talked about

2 Partly in place

3 Done and current

Illustrative example. Karoo Logistics is the fictional cold-chain operator used across our courses. Every answer and figure here is invented, to show the brief a client receives before the workshop.

Where AI can pay off first at Karoo Logistics — and what is in the way

Karoo Logistics (Pty) Ltd · 50–200 people · Cold-chain & general freight

PRE-WORK FROM Chief Executive Officer	RETURNED 7 Jul 2026	WORKSHOP 14 Jul 2026 · 60 min	IN THE ROOM CEO, Operations Director, Business Development Manager, Finance Manager
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At a glance

Your priorities: Serve customers faster or better · Free up staff capacity without hiring · Stay compliant and manage risk

TIME AT STAKE

73 h / week

on the 6 tasks you listed — about R1m a year of staff time (your estimate)

READY TO START

2 of 6

tasks are high value and easy to start — “Do now”

AI READINESS

18%

Not yet started · 21 of 120 across ten areas

AI ALREADY IN USE

5 initiatives

1 high-risk type of use reported

The short version

Three things to take into the room

- OPPORTUNITY

Building temperature-log and POD packs for client audits
Depot admin spends about **20 hours a week** on this (≈ R276k a year), daily. It is repeatable and the information is largely digital — the best place to start. You said: “Logs sit in the telematics system, PODs on paper — every audit request is a manual hunt.”
- BLOCKER

Known costs and proof it works — 8%
Money is being spent with no way to show it pays back — and no point at which anyone would stop. This is your weakest area, and it caps what you can safely take on — whatever the average says.
- RISK

People use personal ChatGPT / Claude / Gemini accounts for work
Company and customer information may be going into personal accounts, with no record and no control.

Decisions for this workshop

We aim to leave with all three made

- 1

Pick one task to prove the value in the next 30 days. Our candidate: Preparing client quotes from enquiries, or building temperature-log and POD packs for client audits.
- 2

Name who owns “known costs and proof it works” — one role, one date — because it is the floor under everything else.
- 3

Decide what happens now to the use of personal AI accounts — keep, contain or stop.

Where the time goes — and where AI fits

Your own estimates, from the pre-work

#	TASK	HOURS / WEEK	COST OF THE TIME / YR	VALUE	EASE	WHERE IT LANDS
1	Preparing client quotes from enquiries Business development · Across teams or systems — “Quotes wait for sign-off and rate checks; two went out last month with an old fuel surcharge.”	16	R221k	16	12	Do now
2	Building temperature-log and POD packs for client audits Depot admin · Across teams or systems — “Logs sit in the telematics system, PODs on paper — every audit request is a manual hunt.”	20	R276k	20	15	Do now
3	Answering retailer supplier-onboarding questionnaires Commercial · Across teams or systems — “Every retailer asks the same questions in a different format.”	12	R166k	12	4	Plan
4	Weekly route-exception summaries for depot managers Operations · One team — “Copied by hand from three depots every Monday.”	8	R110k	9	16	Pilot
5	Month-end fuel-surcharge and invoice checks Finance · One person — “Two days of matching invoices to the published diesel rate.”	12	R166k	8	20	Pilot
6	Recruiting and onboarding drivers HR · One person — “Peak-season hiring is a scramble every October.”	5	R69k	9	6	Park
Total		73	R1m			



How to read the map. Each task gets two scores from 1 to 25, both built from your answers. **Value** = how often it happens × how much time it takes. **Ease** = how repeatable it is × how ready the information is. 12 or more is high.

- Do now** High value, easy. Start here.
- Plan** High value, hard. Name the blocker first.
- Pilot** Easy, lower value. Good for learning.
- Park** Neither yet. A deliberate “not now”.

These are draft scores from one person’s answers. We re-score them out loud in the workshop. Rand figures = hours × 46 working weeks × your cost of an hour (R300). They show what the time costs today, not a saving.

QUESTIONS FOR THE ROOM

? **Building temperature-log and POD packs for client audits:** walk us through the last one, step by step. Where does the time actually go?

? What would have to be true to try **preparing client quotes from enquiries** with AI in the next 30 days — and who would own it?

? **Answering retailer supplier-onboarding questionnaires** is high value but hard. Is the problem the information, the rules, or the people involved?

? Are we comfortable parking **recruiting and onboarding drivers** for now? Parking something is a decision, not a failure.

How ready is the business to use AI well?

40 of 40 statements answered · 21/120

DIRECTION · STEPS 1–3

33%

Is AI a business decision, with a reason and priorities?

CONTROL · STEPS 4–7

8%

Are costs, rules, data and ownership in place before the spend? **Your weakest area.**

SCALE · STEPS 8–10

14%

Is AI becoming part of targets, people plans and reporting?

#	AREA	WHAT GOOD LOOKS LIKE — IN TEN AREAS	SCORE	COMPLETION	STATUS
1	Direction	A clear business reason for AI Framework: Reach the tipping point	6/12	50%	Partly there
2	Direction	An honest view of our starting point Framework: Assess readiness honestly	3/12	25%	Early days
3	Direction	A short list of funded priorities Framework: Choose the bets	3/12	25%	Early days
4	Control	Known costs and proof it works Framework: Cost and prove the bets	1/12	8%	Early days
5	Control	Simple rules for safe use Framework: Set the guardrails	1/12	8%	Early days
6	Control	Control of our data and suppliers Framework: Make the sovereignty call	1/12	8%	Early days
7	Control	Someone coordinating AI Framework: Stand up the CoE	1/12	8%	Early days
8	Scale	Targets updated for AI Framework: Align the OKRs	2/12	17%	Early days
9	Scale	People brought along Framework: Lead the trust curve	1/12	8%	Early days
10	Scale	Results reported with the financials Framework: Measure and re-score	2/12	17%	Early days

The three gaps that matter most

Lowest first — the weakest area caps the rest

1. Known costs and proof it works
1/12 · **EARLY DAYS**
WHAT IT COSTS YOU
Money is being spent with no way to show it pays back — and no point at which anyone would stop.
WHAT GOOD LOOKS LIKE
A 12-month cost estimate and a written stop-point for each project.
QUESTION FOR THE ROOM
For our biggest AI spend: what result would make us stop, and who is allowed to say so?

2. Simple rules for safe use
1/12 · **EARLY DAYS**
WHAT IT COSTS YOU
Staff are using AI without rules, so the business carries risks it cannot see.
WHAT GOOD LOOKS LIKE
A one-page AI policy a new joiner can follow on day one.
QUESTION FOR THE ROOM
Could someone who joined yesterday follow our AI rules without asking anyone?

3. Control of our data and suppliers
1/12 · **EARLY DAYS**
WHAT IT COSTS YOU
Customer, staff and commercial information may be leaving the business with no record of where it went.
WHAT GOOD LOOKS LIKE
A one-page decision on which information may go into which kind of tool.
QUESTION FOR THE ROOM
Where does our customer data go when someone pastes it into an AI tool?

What is already happening – and what it exposes

● high ● medium ● low

REPORTED USE	BUSINESS EXPOSURE	QUESTION FOR THE ROOM
● People use personal ChatGPT / Claude / Gemini accounts for work	Company and customer information may be going into personal accounts, with no record and no control.	<i>What has gone into personal accounts – and is that acceptable?</i>
● AI features inside software we already licence (CRM, ERP, helpdesk...)	AI arrived inside existing contracts; data terms may have changed without anyone reviewing them.	<i>Has anyone read the AI terms in those supplier contracts?</i>
● Nothing formal – but we know it is happening anyway	Use is happening but unseen – the risk is real, its size unknown.	<i>How would we find out what is actually being used?</i>

Initiatives you listed

5 initiatives listed · 1 runs on personal accounts · 1 stopped or paused

#	WHAT IT IS	AREA	TOOL OR PLATFORM	STAGE
1	Drafting quote emails	Business development	ChatGPT, personal accounts	In use
2	Temperature-excursion summaries	Operations	AI feature in the telematics platform	Piloting
3	Weekly client digest emails	Customer service	Copilot trial	Stopped
4	Route optimiser	Operations	Vendor demo	Idea
5	Driver performance scoring	Operations	Telematics add-on	Idea

In your words

From the pre-work, Chief Executive Officer

HOW AI SHOWS UP TODAY

“The office uses ChatGPT on their phones for quote emails. The yard thinks AI is about scoring drivers.”

WHAT IS WORKING, AND WHAT IS NOT

“Quote drafts are faster, but two went out with last month's fuel surcharge. The Copilot trial for client digests stopped when the licences ran out and nobody asked for them back.”

QUESTIONS YOU CANNOT ANSWER YET

“What may go into these tools – client rates? temperature logs? Will the union see this as driver surveillance? What should it cost us?”

THE DIRECTION, HOWEVER VAGUE

“Get quoting and audit packs off the business development and depot admin desks before the November export peak.”

ALSO WORTH KNOWING

“The board wants an AI position in September. Nothing new goes live during peak season (November to March).”

HOW IT WORKS

From questionnaire to a clear first move.

1 · Agree the session

A short call to agree who attends, the date, and in person or online.

2 · Pre-work · 12-15 min

One person completes the questionnaire, one week before.

3 · We build your brief

Answers scored, tasks costed and mapped, weakest area named, the hour planned.

4 · Workshop · 60 min

The leadership team walks the top tasks, sees AI working on one of its own documents, and decides.

5 · Report-out · 30 min

The final brief — with scores, owners and decisions — walked through with you.

What you leave with

One task to prove value, one owner and one date, and a clear call on the AI already in use.

Want this brief for your business?

Book a free 15-minute call. We'll tell you honestly whether a Discovery Session is the right first step — in person or by video, wherever you are.

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