

The ROI Tracker

One workflow. Thirty days. Four numbers. Room for two pilots on one sheet.

Owners try to measure AI across the whole business, get a mess of numbers they do not trust, and quit. Measure one workflow in one department instead. Four boxes. Thirty days.

That is a number you can take to your accountant.

The four numbers

1 Hours returned

How long the job took before, minus how long it takes now. Per week. Measure the same job, not the department.

2 Line items eliminated

Real money that stopped leaving. A canceled subscription, contractor hours you no longer bill, an overtime shift that went away.

3 Work that now happens that did not before

The hardest to count and usually the largest. The report nobody had time to build. The follow-up nobody got to. Put a dollar value on it even if the number is rough, because a spreadsheet that only counts time saved will always undercount this.

4 What the tools cost

Every seat, including the ones nobody opens. This is where people cheat, and on a forty-seat sheet the unused seats are often the biggest line. Write down seats bought, seats in use, and seats sitting idle. Do not cheat.

Fill in the before column on day 1

Do it before anyone opens the tool. You cannot rebuild a before number at day 30. Write down the hours, who does the job, how often it gets skipped, and the number of seats and the price per seat.

Worked example

Workflow: Client onboarding paperwork at Cedar Fork Mechanical, three locations

Department: Client services **Tool:** Claude Cowork, Team plan

Started: October 5 · **Reviewed:** November 4

LINE	RESULT
Hours before, per week (three locations combined)	5.0
Hours after, per week	1.0
Hours returned per week	4.0
Value of that time, at \$30/hr loaded	\$120/week, or \$520/month
Line items eliminated	Stopped mailing welcome letters at one location: about \$70/month in printing and postage
Work now happening that did not before	The 30-day follow-up call, which nobody owned, now goes to every new customer at all three locations. Three of those calls became booked service visits, roughly \$1,300 billed.
Tool cost	5 seats at \$20 = \$100/month (3 in use, 2 sitting unused)
Net, month one	+\$1,790

READ THIS ROW TWICE

The new-work number is the honest one, and the one that would have been missed. Hours returned were worth \$520. The follow-up calls that finally happened were worth \$1,300, two and a half times that. And the two unused seats cost \$40 a month for nothing.

Cedar Fork Mechanical is the invented company from class, and every number here is illustrative. Seat pricing is the Claude Team plan on annual billing. Use your real invoice.

Reading the result

Clearly positive

Write down what the setup was, then pick the next workflow in the next department. Do not scale to five at once.

Close to breakeven

Look at number 3 before you conclude anything. New work is the one people undercount, and it is often sitting right there unrecorded.

Negative

Two likely causes. Either you are paying for seats nobody uses, which is a purchasing problem you can fix this week, or the tool was wrong for the job. Check section 1 of this packet before you decide AI does not work for your business.

Do not try to measure the whole business. Do not measure at day 10. Do not count a number you cannot explain to your accountant in one sentence.

Your tracker

One workflow per pilot. Use the Pilot 1 column if you are running one. Use both if two departments are running side by side. Each department name goes on every table so the numbers stay tied to the right pilot.

Your number from class: what would this have cost you? (hours, days, or "it never gets done")

THE PILOT	PILOT 1	PILOT 2
Department		
Workflow		
Tool		
Who owns it		
Start date		
Day 30 review		

Before and after

	PILOT 1 BEFORE	PILOT 1 AFTER	PILOT 2 BEFORE	PILOT 2 AFTER
Hours per week				
Who does it				
How often it gets skipped				

TIME	PILOT 1	PILOT 2
Hours returned per week (before minus after)		
Loaded hourly cost for that person		
Value of hours returned, per month		

Loaded hourly cost is salary plus taxes and benefits, divided by 2,080. If you do not know it, use 1.3 times the hourly wage. Monthly value is hours returned times hourly cost times 4.33 weeks.

The dollars

Line items eliminated

DEPARTMENT	WHAT STOPPED	MONTHLY AMOUNT

Work now happening that did not happen before

DEPARTMENT	WHAT NOW HAPPENS	ROUGH MONTHLY VALUE

Tool cost and seats

DEPARTMENT	TOOL	BOUGHT	IN USE	UNUSED	PER SEAT	MONTHLY
Total						

Count every seat you pay for. Monthly is seats bought times price per seat, not seats in use.

Month-one net

	PILOT 1	PILOT 2
Value of hours returned		
Line items eliminated		
Value of new work		
Subtotal		
Less tool cost		
Net		

Unused seats: what they cost per month

What we are doing about them