



## WHITE PAPER



# Department AI Opportunity Survey

## Unlock High-Impact AI Ideas Across Your Organization

*Designed for Mid-Market MSOs, TPAs & Regional Health Plans | Version April 25, 2025*

### Challenge every team to think big about AI.

Board members keep asking, “What’s our AI plan?” The fastest way to answer is to mine great ideas from the people who do the work every day. Hand this survey to each department and you’ll:

- Spur creative thinking around AI, automation, and data-driven workflow redesign.
- Capture apples-to-apples details you need to judge feasibility, risk, and ROI.
- Build a defensible roadmap that shows you’re moving from talk to tangible value.

### Need this in Word, Google Forms, or SurveyMonkey?

Email [info@seriousdevelopment.com](mailto:info@seriousdevelopment.com) with the subject line “AI Opp Survey” and we’ll send you the editable file.

## PURPOSE

This survey helps **department heads** surface and detail potential AI projects that could boost **productivity, quality, compliance, or member/provider experience**. By answering both open-ended and structured questions, your team will:

1. Define the business **problem** in plain language.
2. Sketch how AI or automation might **solve** it.
3. Provide key inputs—data sources, effort estimates, risks—so your AI Steering Committee can **score, prioritize, and budget** the best ideas for discovery sprints.

Completing the survey should take **10–15 minutes** per idea.



## INSTRUCTIONS

1. Fill out **one survey per distinct workflow or pain point**.
2. Be concise—most answers fit in a sentence or numeric value.
3. Return surveys within **two weeks** to your Steering Committee liaison.

# SECTION A – BIG IDEA OVERVIEW (Open-Ended)

## 1. PROBLEM STATEMENT

*In one or two sentences, what operational pain point are you addressing?*

## 2. PROPOSED AI/AUTOMATION SOLUTION

*Briefly describe how you think AI could fix or improve the problem/process.*

## 3. DESIRED OUTCOME

*What KPI or result (cost, revenue, quality, satisfaction) should improve?*



## SECTION B – STRUCTURED DETAILS

#	Question	Response
1	Current weekly effort spent (hours/FTEs)	#
2	Affected data systems (EHR, CRM, claims, Excel, etc.)	List systems:
3	Data quality rating (1-High and 5 Low)	1 2 3 4 5
4	Touches PHI, claims, or delegated reporting?	Yes / No
5	Decision complexity	Rules-based or Predictive
6	Human approvals after automation	Short text
7	Ballpark annual dollars saved or earned	\$ / “Unsure”
8	Compliance sensitivity (low/med/high)	Low Med High
9	Time-to-impact if green-lit	< 90 days / 3 – 6 mo / 6 – 12 mo / > 12 mo
10	Department priority (1-High and 5 Low)	1 2 3 4 5

**Tip:** If unsure of exact numbers, give your best estimate—precision isn’t required at this stage.

### What Happens Next?

Your AI Steering Committee will apply a scoring rubric (value × feasibility × risk × time-to-impact). High-scoring ideas move into a **4-6 week discovery sprint** where Serious Development helps validate data, design architecture, and build an ROI model.



# SCORING RUBRIC

To be assessed and filled out by department head and or your AI committee.

Dimension	1 - Poor	3 - Moderate	5 - Excellent	Weight
<b>Business Value</b> Cost saved, revenue generated, strategic importance	<input type="checkbox"/> < 5% impact	<input type="checkbox"/> 5 – 10% impact	<input type="checkbox"/> > 10% impact or board-level priority	<b>30%</b>
<b>Technical Feasibility</b> Data quality, system access, model maturity	<input type="checkbox"/> Data scattered / unclear; major integrations unknown	<input type="checkbox"/> Some data gaps; integrations possible with effort	<input type="checkbox"/> Clean data; APIs or tables already accessible	<b>25%</b>
<b>Compliance &amp; Risk</b> PHI exposure, regulatory sensitivity, change risk	<input type="checkbox"/> High regulatory risk or PHI-heavy without controls	<input type="checkbox"/> Moderate risk with mitigations	<input type="checkbox"/> Low risk; controls & auditability built-in	<b>20%</b>
<b>Time-to-Impact</b> Speed to pilot value	<input type="checkbox"/> > 12 months	<input type="checkbox"/> 6 – 12 months	<input type="checkbox"/> < 6 months < 90-day quick win ideal	<b>15%</b>
<b>Org Readiness</b> Stakeholder sponsorship, change-management lift	<input type="checkbox"/> No champion; culture resistant	<input type="checkbox"/> Some support; change effort moderate	<input type="checkbox"/> Executive sponsor; team eager & resourced	<b>10%</b>

**Weighted Score =  $\Sigma$  (Rating × Weight)** Maximum 100

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