MVP use case form

CustomizeMe.ai

Date: _____

Filled in by: _____

Purpose: find where your company loses time and money, and describe one specific process to automate. Facts and numbers help us most, opinions about AI much less.

1. Company

Company name _____ Contact person / role _____

Email _____ Phone _____

Industry _____ Employees / locations _____

Main software in use _____ Who decides on the purchase _____

2. Where do you lose the most time? Tick the 1–3 most important.

- ☐ Phone calls and bookings
- ☐ E-mails and customer enquiries
- ☐ Quotes and cost estimates
- ☐ Data entry and paperwork
- ☐ Invoices and documents
- ☐ Searching for information
- ☐ Visual checks and inspections
- ☐ Reports and status updates
- ☐ Planning and scheduling

Other _____

3. Numbers Estimates are fine: they are the basis for calculating the return on investment.

Orders or cases / month _____ Average order value _____ Calls or enquiries / day _____

% unanswered or missed _____ Time per case _____ Time to prepare a quote _____

Admin hours / week _____ People doing this work (FTE) _____ Errors or rework / month _____

4. Biggest problem

Describe the last time this problem cost you time, money or a customer

_____

If one thing in your company ran by itself, what would it be?

_____

Cost of the problem / month (PLN or hours) _____ How do you handle it today? _____

5. Systems and data What the AI could work with.

- ☐ CRM or ERP system
- ☐ E-mail inbox
- ☐ Phone system / VoIP
- ☐ Calendar or booking system
- ☐ SMS or WhatsApp to customers
- ☐ Documents and shared drives
- ☐ Spreadsheets (Excel)
- ☐ Databases
- ☐ Photos, video or cameras
- ☐ Paper

Other _____

6. Implementation conditions

- ☐ Data must stay in the company
- ☐ Cloud is acceptable
- ☐ Integration with our existing system

Budget (PLN) _____ By when _____ Who will use it _____

How will you know the implementation succeeded?

_____

7. Use case for the technical team Filled in by CustomizeMe.ai after the call.

When (situation / trigger): _____

The AI should (what exactly it does): _____

Inputs / systems: _____

Measurable effect (KPI before → after): _____

Priority / next step: ☐ High ☐ Medium ☐ Low ☐ Demo ☐ Quote ☐ Pilot

Notes:

_____

_____