COMPASS WORKSHEETS

Where does AI belong in your business?

Six worksheets, nine pages. One honest hour. No vendor in the room.

Use these six worksheets to find where missed revenue, repeated work or unhelpful spending may be holding the business back. Map the business, judge how dependably each part of it runs today, score the candidates worth testing, write down why you scored them that way, record the decision you actually make, and keep a learning record for what a small test showed. Print them. Fill them in with a pen.

Work them in order. Each sheet opens by telling you what it is for and ends by pointing at the next one, so the kit runs as one sequence rather than six separate prompts. The cells you cannot answer with confidence are your real to-do list.

These worksheets help you see the map. The paid assessment is where your leadership team agrees on what the map means — competing priorities refereed, optimistic scores challenged, readiness problems surfaced, and one candidate turned into a measurable experiment with an owner and a decision rule.

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Revision: 15 September 2026

WORKSHEET ONE

The map: 25 cells

STEP 1 OF 6 · UNDERSTAND THE BUSINESS

This is a picture of how your company actually works: five ways it creates and protects value down the side, five elements every operation depends on across the top. You start here because you cannot judge where an improvement belongs until you can see the whole board, and it stops the conversation jumping to a tool. Walk one cell at a time and write, in ordinary words, what happens there today — who does it, what it runs on, where it stalls. The boxes you cannot fill in with confidence are findings, not failures.

	PROCESS	PEOPLE	TECHNOLOGY	DATA	VENDORS
Generate Revenue	level ___	level ___	level ___	level ___	level ___
Deliver Value	level ___	level ___	level ___	level ___	level ___
Support Operations	level ___	level ___	level ___	level ___	level ___
Enable Everything	level ___	level ___	level ___	level ___	level ___
Govern & Protect	level ___	level ___	level ___	level ___	level ___

Ask, place, read back. Never lecture. The owners of the work describe their own cell, and every note lands in exactly one place.

> In the assessment, this grid is filled in with the leaders of each area in the room at the same time — which is usually where the disagreements worth having show up.

WHAT TO DO NEXT

Go to worksheet two and put a level in each cell you described. Leave the rest unknown for now — you will know exactly what you need to go and look at.

WORKSHEET TWO

Operational maturity: 0 to 5

STEP 2 OF 6 · HOW THE WORK RUNS TODAY

This grades the cells you just described: how dependably that work runs today, with or without AI. A cell resting on one person's memory needs a different answer from one built into the workflow. Read the six levels, then write a level on worksheet one for each cell you could describe honestly.

0	**None**	The capability does not exist in a dependable form in this area.
1	**Individual**	An individual can perform it, often using personal knowledge or tools.
2	**Approved**	The organization has accepted a method, tool, or policy.
3	**Integrated**	The capability is part of the normal workflow.
4	**Connected**	Relevant data and work are coordinated across systems or teams.
5	**AI-native**	Learning, generation, prediction, or intelligent action is fundamental to how it operates.

Unknown is not 0

If nobody has watched how the work actually runs, leave the cell blank or write “unknown” until there is evidence — it is something to go and look at. A 0 is a separate finding: no dependable capability exists there.

A worked example without any AI in it

A documented invoicing checklist that is used routinely, with a named person responsible, may be a 3 Integrated even though no AI is involved. The same process, never observed, stays unknown rather than 0.

Higher is not automatically better

Each cell has an appropriate level, set by the value at stake, the risk carried, the economics of getting there, and the human impact of the change. 2 or 3 is often sufficient. Sourcing — buy, assemble or build — is a separate decision, and neither it nor the project scorecard changes the level.

> Evidence shown, not claimed. Ask to see the work: what it uses today, who touches it, and what happens when it goes wrong.

WHAT TO DO NEXT

Pick the two or three cells where a better answer would be worth real money, and write one candidate for each on worksheet three. Hold more than one — comparing is the point.

WORKSHEET THREE

Score the candidates

STEP 3 OF 6 · COMPARE THE ALTERNATIVES

This sheet puts your candidates beside each other instead of arguing about one at a time. That matters because the first idea is rarely the best first test, and the comparison usually changes the order. Write one candidate per row, score each 0–5 on the five criteria — 5 is the favorable end of every one — add the total, and read the band. The bands are provisional readings for discussion; none of them authorises spending.

CANDIDATE	BUSINESS IMPACT	LIKELIHOOD OF SUCCESS	ADOPTION FRICTION	TIME TO EVIDENCE	COST & RISK	TOTAL	PROVISIONAL BAND

Reading the totals — provisional, never an authorization

Hard gates first: impact or adoption at 0 or 1, or likelihood at 0, means NOT YET regardless of total.

21–25 RUN — THIS WEEK. Provisional: worth a small test soon, if a baseline exists.

17–20 RUN — 2 WEEKS. Provisional: worth evidence; schedule it deliberately.

13–16 INVEST AFTER EVIDENCE — only if business impact is 4 or 5. Something has to be proven first.

Anything else — NOT YET. Park it with the reason written down, and a date to look again.

A high score is not permission to fund a project. It can lead to a small test, to baseline-only preparation while you get a measurement in place, or to a deliberate defer. A low score is information: ask what would have to change for it to move.

> Optimistic scores are the most common failure of doing this alone. An outside referee with no stake in the answer is most of what the assessment buys you.

WHAT TO DO NEXT

Take the candidate at the top of your list to worksheet four and write down why each of its five scores is what it is. A number you cannot explain will not survive the first challenge.

WORKSHEET FOUR

Why you scored it that way

STEP 4 OF 6 · THE REASONING BEHIND THE SCORES

One page per candidate, and it is where the scoring becomes honest. A number nobody can explain is not evidence, and writing the reason down is what lets somebody else challenge it — or change your own mind. Copy the five scores over from worksheet three, write the reason beside each, then finish with what you have not actually observed.

Candidate
One sentence, in ordinary business words.

Business impact ___ / 5
Reason, and the evidence behind it.

Likelihood of success ___ / 5
Reason, and the evidence behind it.

Adoption friction ___ / 5 (5 = easy to absorb)
Reason, and the evidence behind it.

Time to evidence ___ / 5 (5 = credible evidence arrives quickly and cheaply)
Reason, and the evidence behind it.

Cost & risk ___ / 5 (5 = favorable)
Reason, and the evidence behind it.

Uncertainty and unknowns
What have you not observed? What would you have to go and look at?

WHAT TO DO NEXT

Carry the same candidate to worksheet five. Now that the reasoning is visible, decide what you are actually going to do about it.

WORKSHEET FIVE

Scope, assumptions and the decision

STEP 5 OF 6 · THE DECISION YOU ACTUALLY MAKE

Same candidate. This sheet records the decision itself, because a score is a reading and not an approval, and three months later nobody remembers why something was parked. Write the scope and the assumptions you are relying on, tick one decision — run a small test, prepare or measure first, or defer — and say why. If you defer, write what would have to be true to bring it back, and a date.

Scope
What is in, what is explicitly out, and who is affected.

Assumptions we are relying on
State them plainly, so they can be wrong out loud.

Decision today (tick one)

☐	**Run a small test**	Smallest thing that could produce credible evidence, time-boxed.
☐	**Prepare or measure first**	Get a baseline or a measurement in place before spending.
☐	**Defer**	Not now. Write the reason, not just the verdict.

Why this decision

If deferred: conditions that would bring it back
What would have to be true, and the date you will look again.

WHAT TO DO NEXT

If you ticked run a small test, set it up on worksheet six, part one. If you ticked prepare or measure first, that page is still the one to fill in — the baseline is the thing you are going after.

WORKSHEET SIX · PART ONE

The learning record: before the test

STEP 6 OF 6 · LEARN SOMETHING CHEAPLY

This is how a decision turns into evidence instead of a project. It keeps a small test small: one owner, one bounded change, a baseline, a time and cost limit, and a stop rule written before enthusiasm can rewrite it. Fill this page in before anything starts; part two is for what actually happened.

Business outcome, and where it shows up
Which P&L or balance-sheet line would move if this worked?

Accountable owner
One name. Not a committee.

Bounded intervention
The smallest change being made, and what is deliberately left alone.

Baseline or measurement gate
The number as it stands today — or the measurement you must put in place first.

Target
What would count as a useful result.

Time and sample boundary
How long it runs, and over how many cases.

Cost and capacity limit
Money and people-time you are willing to spend before deciding.

Stop, continue or revise rule
Written before you start, so enthusiasm cannot rewrite it later.

WHAT TO DO NEXT

Run it inside those limits, changing nothing else. When the time or sample boundary is reached, fill in part two — whatever the result.

WORKSHEET SIX · PART TWO

The learning record: after the test

STEP 6 OF 6 · WHAT ACTUALLY HAPPENED

Fill this in once the test has run to its boundary. Write what happened rather than what you hoped for: a result that disappoints is still cheap learning, and it is the honest input the next comparison needs. Cheap learning is not a costed rollout and does not prove a benefit.

Observed result
What actually happened against the baseline and the target.

What it showed about adoption
Did the people doing the work actually use it, and what got in the way?

What you now know that you did not
And what is still unknown, or would need a longer look.

Next decision, and date
Stop, continue, revise, prepare further, or defer — and who decided.

WHAT TO DO NEXT

Go back to worksheet three with what you learned. The scores move, the order changes, and the next candidate is usually already on the sheet.

WHAT COMES NEXT

Seeing the map, and agreeing what it means

These worksheets are enough to see where an improvement could return time to people, reduce waste or create room to grow, and to find one candidate worth testing. That is real progress, and the decision is yours to keep.

What they cannot do is settle an argument. When four leaders each have a priority, when the scores come back suspiciously high, when the readiness problem everybody knows about is the one nobody says out loud — that is where the assessment earns its fee.

- **Neutral facilitation**
  Competing priorities refereed by someone with no stake in which one wins.
- **Assumptions challenged**
  Optimistic scores and comfortable estimates tested out loud, in front of everyone.
- **Readiness surfaced**
  The process, data and adoption problems people tend to route around.
- **Agreement on what not to do**
  The shortest list in the room, and usually the most valuable.
- **One measurable experiment**
  A named owner, a time box, a number, and the decision rule written in advance.

The method behind these worksheets is written out in full and kept current at compassadvisory.ai/reference, alongside compassadvisory.ai/how-compass-works.

When you are ready to put your leadership team around this map: compassadvisory.ai/work-with-adam