AI Quick Win Scorecard

Find the task worth handing to AI first. AI drafts it, a person checks it.

OnPoint RESULTS

1. Pick up to 3 tasks
Things that eat your time, repeat often, or make people groan.

2. Check the gates
Go, Caution, or Stop for each. Any Stop = Not yet.

3. Score the points
Five factors, 1–4 each. Total out of 20, then look up the tier.

Step 2 · The Gates

Does your task pass all three gates? Check these first.

Gate	Go	Caution	Stop
Instructions	The steps are written down, *or* you have past examples that follow a clear pattern	A few examples, but the pattern is loose	No written steps and no examples. "I just know it when I see it"
Review time	Someone qualified can check the AI's version, and checking takes clearly less time than doing it	Checking takes close to as long, or the reviewer is already stretched	Reviewing will take as long as doing the task, or no one qualified is available to review
Stakes	Mistakes will get caught in review or are cheap to fix if one slips through	The review step would likely catch mistakes, but one could reach the customer	If a mistake reaches a customer, it would cost real money or create legal or safety exposure

Step 3 · The Points

Use this chart to score your task on Time, Frequency, Pain/Pleasure, Deliverable, and Tool Access. Fill in the scores on the next page.

Factor	1 point	2 points	3 points	4 points
Time	Under 2 hrs / month	2–6 hrs / month	6–12 hrs / month	12+ hrs / month
Frequency	Quarterly or less	Monthly	Weekly	Daily
Pain / Pleasure	Want to keep it. It's my craft	Neutral	Glad to lose it	Want it gone tomorrow
Deliverable	The real work is an action (call, visit, physical job)	AI gathers the info you need before the action	AI writes something you then send or act on	AI produces the finished thing (email, summary, filled form, spreadsheet)
Tool access	Copy/paste, screenshots, PDFs, notes	Export (CSV, Excel, scheduled report)	Connects through a third-party tool like Zapier	**Built-in connector or MCP server** linking your software to the AI tool

Flag, not scored: Sensitive data

Customer personal info, financials, health records, or legal content don't rule a task out, but handle them deliberately: remove identifying details, use a business AI account, and follow your own policies (HIPAA for patient information).

Your Scoresheet

Gates first. Then points. Then the tier.

	Task 1	Task 2	Task 3
Task name			
Gates: circle Go / Caution / Stop			
Instructions	Go · Caution · Stop	Go · Caution · Stop	Go · Caution · Stop
Review time	Go · Caution · Stop	Go · Caution · Stop	Go · Caution · Stop
Stakes	Go · Caution · Stop	Go · Caution · Stop	Go · Caution · Stop
Points: 1–4 each			
Time (hrs/month)			
Frequency			
Pain / Pleasure			
Deliverable			
Tool access			
Total	**/ 20**	**/ 20**	**/ 20**
Sensitive data?	Yes ☐ No ☐	Yes ☐ No ☐	Yes ☐ No ☐
Tier	Strong · Maybe · Not yet	Strong · Maybe · Not yet	Strong · Maybe · Not yet

Tier Lookup

Gates	Points	Tier
All 🟢 Go	14–20	**Strong.** Start here.
All 🟢 Go	5–13	**Maybe.** It works, but the payoff is smaller.
Any 🟠 Caution (no Stops)	Any score	**Maybe.** Fix the caution, then score it again.
Any 🔴 Stop	Any score	**Not yet.** Fix the gate that stopped it. A high score tells you it's worth fixing.

Always check the gates before adding points. A great score never overrides a Stop. More than one Strong? Start with the one you're most likely to finish.

My quick win is:

Who will review it, and my first step this week:

Use This Scorecard with AI

Works with ChatGPT, Claude, or Gemini.

Upload this PDF to your AI tool, then paste in the instructions below. The AI walks you through the questions, looks up how your software connects, and does the scoring.

Instructions for the AI:

Use the attached AI Quick Win Scorecard to help me score up to three tasks I'm thinking about handing to AI. Start by asking about my role and business and what tasks take up my time. Then go through one task at a time, a few questions at a time. Don't repeat questions you already have answers to.

Check the three gates first (Instructions, Review time, Stakes) and mark each Go, Caution, or Stop. If any gate is Stop, the task is Not yet. Tell me which gate stopped it and what would fix it, and don't let a high point total override it.

For Tool access: when I name the software where the data lives, search the web to find out whether it has a built-in connector to your platform or an **MCP server (Model Context Protocol)**. Then check for third-party connections like Zapier, then export options. Tell me what you found and mark it "worth confirming," since plans and features change. If you can't search the web, ask me what I know and mark it "unverified."

Score Time in hours per month. Use the Points table and the Tier Lookup exactly as written: total out of 20; Strong needs all gates Go and 14 or more points.

When you're done, give me a table with each task's gates, points, total, and tier, flag any sensitive data, and tell me which task to start with and why.

Tips

- Be specific. "Writing follow-up emails after sales calls" scores better than "sales."
- Have a rough count ready: how many emails, forms, or reports a month, and how long each takes.
- Before you paste in real customer or financial details, read the Sensitive data note on page 1.

Want help setting this up? Contact Nikki Stine at OnPoint Results
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