Amplify 2026

November 2-5 Scottsdale, AZ

Value Lab: Quantifying the AI Opportunity

Dana Centola | Travis Ellis | Jen McIver

Wolters Kluwer

ELM Solutions



AGENDA

Build a more complete, credible case for where AI creates value

By the end of the session, you'll have a framework and tools to:

ARTICULATE VALUE · COMPARE OPPORTUNITIES · BUILD THE CASE

1

Define baseline

Define the workflow and establish the current state

2

Assess value

Apply an evaluation rubric to assess where AI creates value

3

Measure impact

Evaluate the change and decide where to act first

4

Package case

Bring the work together into a practical value case*

Value Lab Copilot prompt

Scan, copy the prompt into Copilot, then add your inputs as we go.
Follow your organization's AI and data policies.

**This framework is not a financial ROI calculation. Add your organization's costs and investment assumptions to extend the analysis into a financial business case.*



SECTION 1 | DEFINE BASELINE

Start with the workflow

Define the workflow and establish the current state

DEFINE BASELINE

Your value case starts with understanding the workflow, what needs to change, and why it matters

1 Today

Define how the work happens now and identify the main pain points

WHY IT MATTERS LATER

It becomes the baseline you score against in Assess Value

- Key steps and handoffs
- Pain points
- People and systems involved
- Time, effort, volume, and frequency

2 The change

Determine what specific step(s) could work differently with AI

WHY IT MATTERS LATER

It keeps the claim separate from the problem, so it can be tested

- Workflow step that changes
- What AI would do differently
- What the person still owns

3 The benefit

Consider what should improve if the change works

WHY IT MATTERS LATER

It tells you which value dimensions to assess next

- Less time or effort
- Faster completion
- Better quality or consistency
- Lower risk
- Better visibility or decisions

DEFINE BASELINE

Example: Invoice review

Workflow: Review rule-flagged invoice line items against billing guidelines **Persona:** Legal ops manager

1

TODAY

1. Invoices arrive through e-billing
2. Rules flag line items that conflict with guidelines, one line at a time
3. Reviewer works through the flag list, checking each narrative for context
4. Reviewer decides each adjustment, interpreting guidelines with exceptions

Pain: so many flags that real issues get buried, and the same guideline is applied inconsistently.

2

THE CHANGE

- AI reads each line and its narrative against the full guideline, including prerequisites and exceptions
- Flags are prioritized, with the reasoning and the guideline shown
- Likely false positives are marked for quick review
- The reviewer still decides every adjustment

3

THE BENEFIT

- Fewer flags to work through
- Guidelines applied the same way every time
- Adjustments easier to explain to firms
- Faster approval

Benefit: real issues surface first, and guidelines are applied consistently

---

Our own workflow: Product Value Pitch Agent **Persona:** Product manager

TODAY

PMs draw on roadmap, research, and customer feedback to write a product value pitch for each feature they own. Some pitches cite evidence; others rely on judgment.

Pain: Which sources get used, and how thoroughly, varies by PM and by feature, and evidence gaps surface only after stakeholders see the pitch.

THE CHANGE

The agent pulls from approved sources into a standard first draft, links each claim to its source, and flags where evidence is missing. The PM reviews, edits, and owns the story.

THE BENEFIT

Less time gathering inputs, a consistent structure across features, evidence gaps caught before review, and more time to pressure-test the value story.

Benefit: Stronger, evidence-backed storytelling about feature value across all stakeholders.

Put it into practice: define your baseline

1. **Choose one workflow**

   A single step is fine. Stuck? Try invoice review, budget forecasting, or outside counsel selection

2. **Tell today's story**

   One persona, the steps in order, and where it slows down or breaks

3. **Describe the change**

   Which step changes, what AI does, and what the person still owns

4. **Name the benefit**

   What should improve if the change works

A good workflow...

- Happens often or carries a high cost
- You own it or can influence it
- You can name the pain today
- Data can reasonably be collected

8

MINUTES

Worksheet page 1

On your canvas

Box 1: Write the workflow name now. You'll finish the value statement at the end.

Copilot prompt



SECTION 2 | ASSESS VALUE

See the whole impact

Apply an evaluation rubric to assess where AI creates value

AI value shows up across six dimensions; A rubric standardizes the scale

PRODUCTIVITY How fast the work moves, how much effort it takes, and what more Legal can deliver

Speed

Elapsed time from request to result

Measured by: Days or hours from start to outcome

Capacity

Human effort the work requires

Measured by: Person-hours per unit of work

New capability

Outputs, services, or decisions Legal couldn't deliver before

Measured by: New outputs or decisions informed

CONTROL How well the work is done, how well it's protected, and how much money stays in the budget

Quality and consistency

Work done correctly, the same way every time

Measured by: Errors, rework, reviewer variation

Risk and control

Ability to catch problems and prove how decisions were made

Measured by: Coverage, early detection, audit trail

Spend control

Money kept in the budget: spend, leakage, avoidable cost

Measured by: Dollars

What each score means, by dimension

Dimension	1 Ad hoc	2 Basic	3 Consistent	4 Managed	5 Optimized
In general	*Depends on individuals; no defined method*	*Some tools or rules; gaps covered by workarounds*	*Defined method, applied the same way most of the time*	*Measured against targets; issues caught early*	*Improves continuously; informs decisions beyond the workflow*
Speed	Turnaround unknown; work waits in queues	Turnaround tracked; often misses **your target**	**Most** items meet **your target cycle time**	Delays flagged early; **nearly all** items on time	Results available **on demand**; no queue
Capacity	Effort per item unknown; varies by person	Tools help, but **most items** still need full effort	Effort per item steady at **your standard**	Effort goes only to **items that need judgment**	Volume grows **X%** without added headcount
New capability	Legal delivers only its core service	One-off insight, **when someone asks**	A repeatable new output, such as **a recurring report**	A new service the business **relies on**	Legal informs **decisions it wasn't part of before**
Quality and consistency	Outcome depends on who does the work	Templates or checklists exist; results vary **often**	Same standard or criteria applied to **most items**	Errors are **rare** and caught before they reach the business	Errors below **your tolerance**; same result regardless of who does it
Risk and control	Review gaps unknown; decisions not recorded	**Sample-based** review; issues found after the fact	Coverage defined; decisions traceable on request	**Full** coverage; issues caught **before decisions are final**	Controls monitored continuously; **audits** need no manual prep
Spend control	Spend reviewed after the fact; avoidable cost unknown	Rules catch **obvious overspend**; most avoidable cost unseen	Guidelines applied to **most spend** before it's committed or paid	Avoidable cost held under **your target**	Spend patterns inform **budget, rate, and firm decisions**

How to use

Underlined phrases are values your organization sets. Use the worksheet examples today; adapt afterward.

Change by levels moved

0	1	2	3	4
No change	Minor	Moderate	Substantial	Major

Size of the change, not its value.

Confidence level

Observed: Current data or a demonstrated result

Estimated: A reasonable assumption to test

Directional: Credible, but size not yet known

Example: Invoice review

Workflow: Invoice review – Reviewing rule-flagged invoice line items against billing guidelines **Persona:** Legal ops manager

Dimension	Today	Why	With AI	Why	Change	Confidence
Speed	2 Basic	Approval often runs past target while flags are cleared	3 Consistent	Fewer flags to clear; most invoices meet the target cycle	**Minor**	**Estimated**
Capacity	2 Basic	Reviewers work through every flag, many of them false positives	4 Managed	Effort goes to prioritized flags that need judgment	**Moderate**	**Estimated**
New capability	1 Ad hoc	No view of billing patterns across firms	2 Basic	Firm-level patterns available on request	**Minor**	**Directional**
Quality and consistency	1 Ad hoc	Interpretive guidelines are applied differently by each reviewer	4 Managed	Same reasoning shown for every flag; errors caught before approval	**Substantial**	**Observed**
Risk and control	2 Basic	Rules check each line in isolation; rationale isn't recorded	4 Managed	Every line reviewed in context; issues caught before approval	**Moderate**	**Observed**
Spend control	2 Basic	Rules catch obvious violations; interpretive calls are missed	3 Consistent	Guidelines with prerequisites enforced on most spend	**Minor**	**Directional**

Scoring note: **You may not have a material improvement on one or more of the dimensions. That's OK. Focus on the dimensions you are able to identify.**

Illustrative example, not tied to a specific customer or vendor.

Put it into practice: score the workflows

1 **Choose the dimensions that matter**

Select the two to four this workflow could realistically move – you'll use the same dimensions for today's workflow and with AI

2 **Score today's workflow**

Pick the state that matches what you observe now and write one line on why

3 **Score the change with AI**

Pick the state the workflow would reach and explain any assumptions behind it

4 **Name the change and confidence level**

Count levels moved; mark Observed, Estimated, or Directional

Scoring rules

Score what you observe
not how the process should work

Give every score a reason
the measure or assumption behind it

Between two levels, choose lower
conservative scores hold up

8

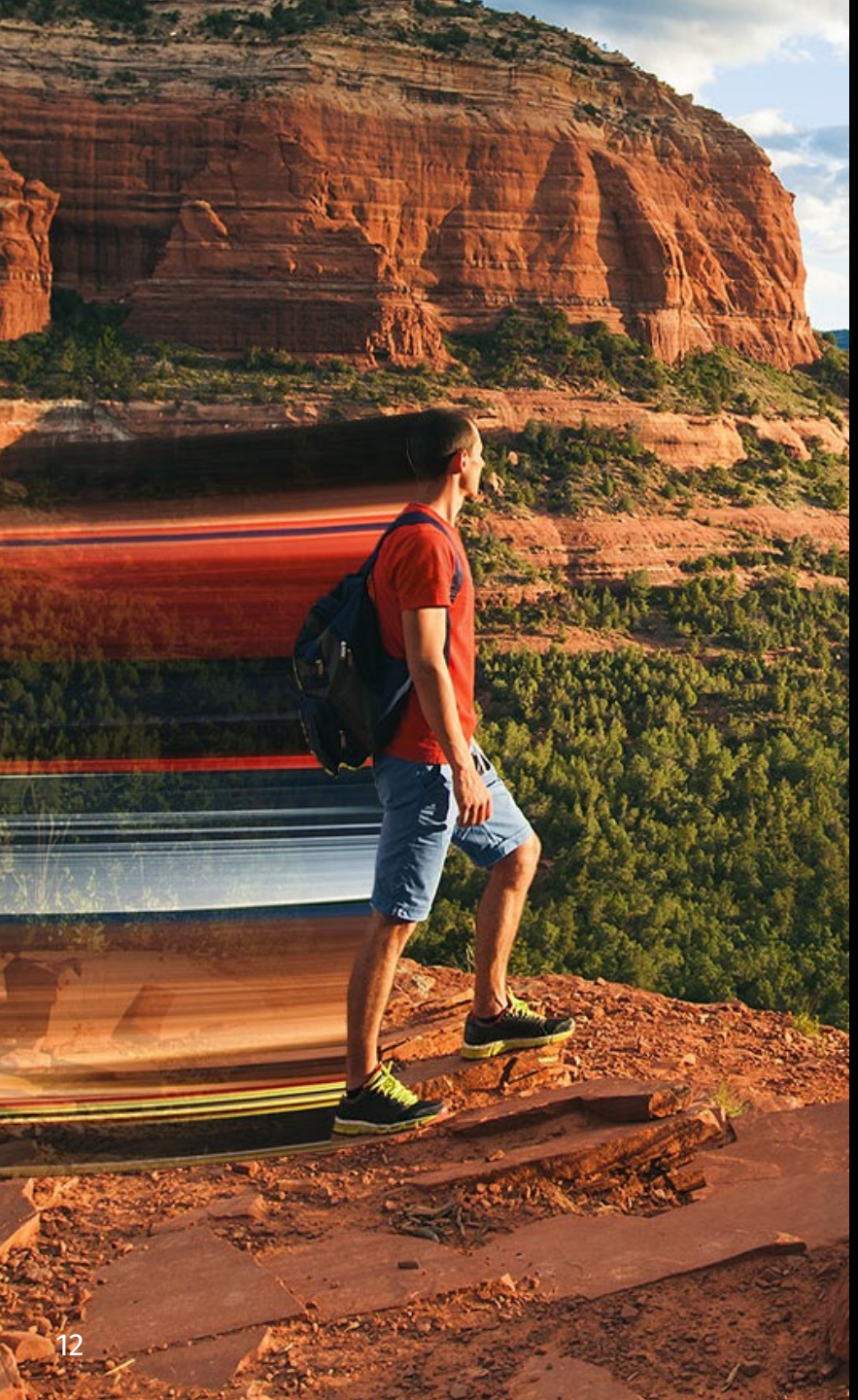
MINUTES

Worksheet 2

On your canvas

Box 2: Check the dimensions you scored.

Copilot prompt



SECTION 3 | MEASURE IMPACT

Make the case credible

Quantify the change behind your most important scores

MEASURE IMPACT

Quantify the change

1 BREADTH

How many dimensions move

Count where With AI beats today

2 MAGNITUDE

How far each one moves

Count moves by size: Minor to Major

3 PRIMARY DRIVERS

Which are the priority items for your business

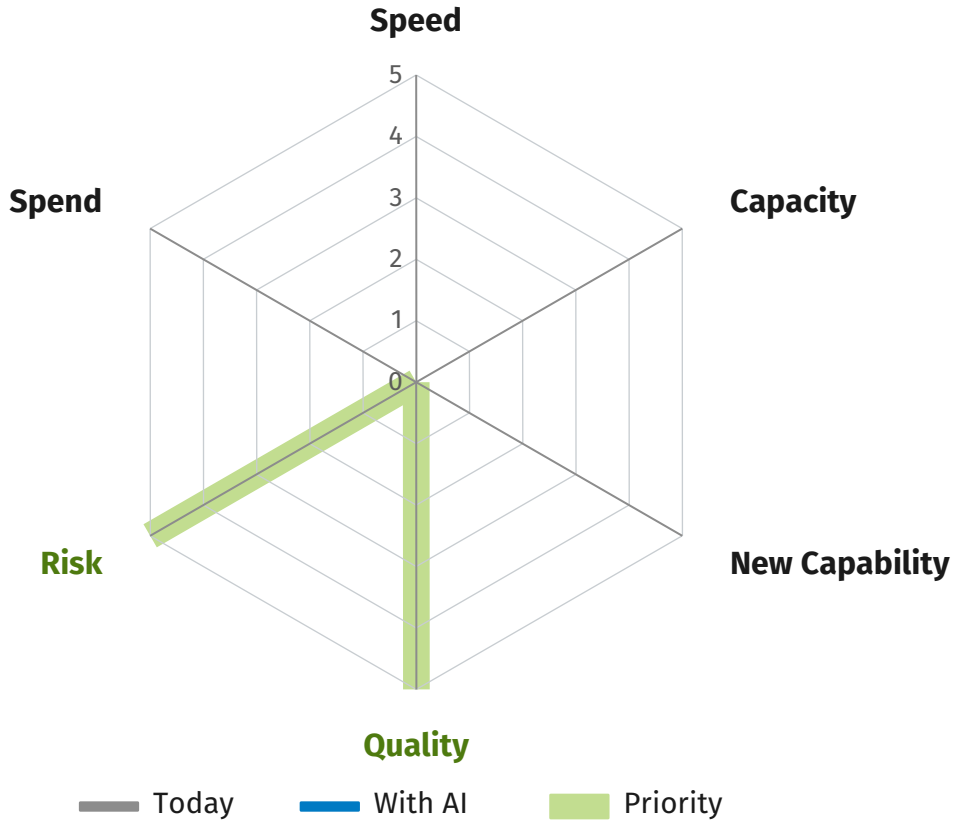
Determine which dimensions are the most important

4 EVIDENCE

How much is proven

Count moves by confidence level

Plot values to visualize



Gaps show breadth and magnitude. Shaded axes are your decision maker's priorities, so you can see whether the biggest moves land.

MEASURE IMPACT

Quantify the change

1 — BREADTH
How many dimensions move
Count where With AI beats Today
6 of 6

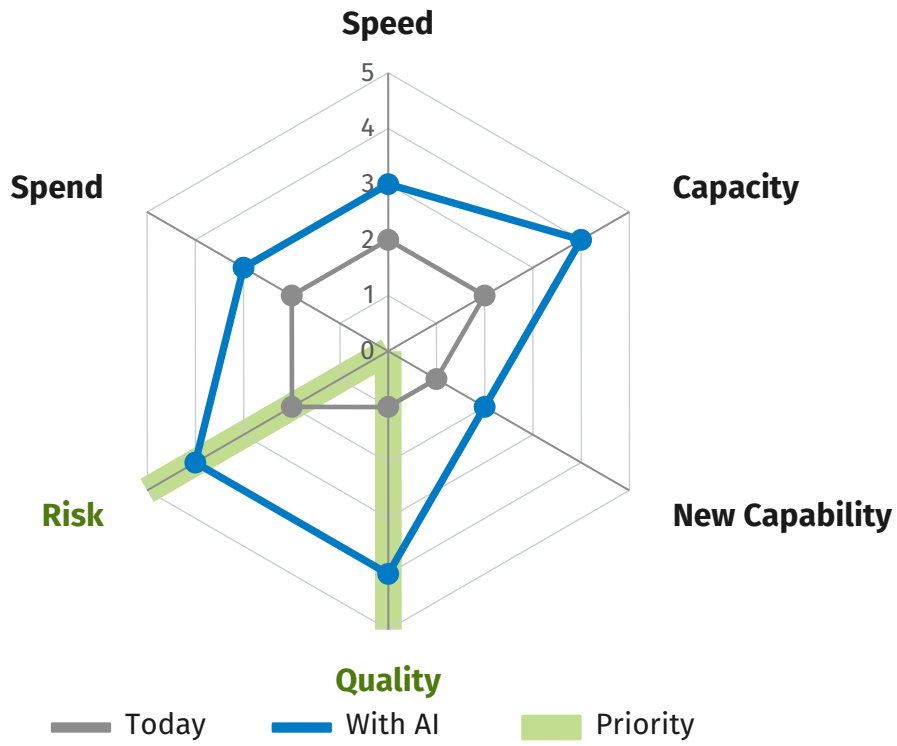
2 — MAGNITUDE
How far each one moves
Count moves by size: Minor to Major
1 Substantial
2 Moderate
3 Minor

3 — PRIMARY DRIVERS
Which are the priority items for your business
Determine which dimensions are the most important
Quality
Risk

4 — EVIDENCE
How much is proven
Count moves by confidence level
2 Observed
2 Estimated
2 Directional

Example: Invoice review

Decision maker: GC | Priorities: Quality, Risk



The biggest moves land on the shaded priority axes, and both are Observed.

MEASURE IMPACT

Put it into practice: construct your value profile

1. **Plot your shape**

   Draw Today and With AI. Count breadth and magnitude.

2. **Pick your primary drivers**

   One or two moves that inform your decision.

3. **Check evidence and readiness**

   Confidence on each driver; readiness Low, Medium, or High.

4. **Make the call**

   Pursue, Pilot, or Park, plus one specific next step.

7

MINUTES

Worksheet page 4

On your canvas

Boxes 3, 4, and 5: profile, primary drivers, and recommendation.

Copilot prompt



SECTION 4 | PACKAGE CASE

Bring it together

Assemble the work into a one-page value case*

PACKAGE CASE

End with a call, not a score

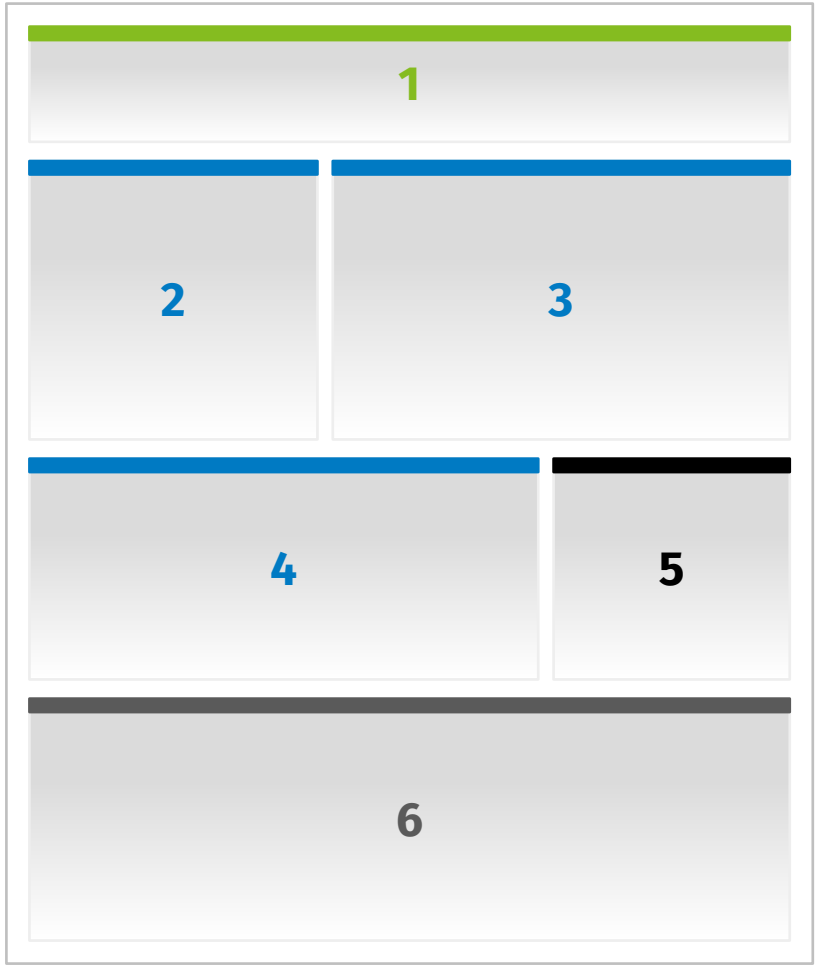
Call	When	Next step
Pursue	The biggest moves land on your priorities, they're Observed, and readiness is Medium or High	**Build the full case**
Pilot	They land on your priorities, but they're Estimated or readiness is Low	**Test the primary driver first**
Park	They don't land on your priorities, or they're only Directional	**Revisit when priorities change**

Both Pursue? Rank by the moves on your priority axes. Readiness breaks a tie.

Your canvas is the evidence. The call is what you ask for.

PACKAGE CASE

The canvas brings your case together on one page



FROM

1 **Value statement** — All
Written last, from everything below

2 **Priorities and dimensions** — Worksheets 1, 2
What matters and what you scored

3 **Value profile** — Worksheet 4
Shape, breadth, magnitude

4 **Primary drivers** — Worksheet 4
The moves that carry the case

5 **Recommendation** — Worksheet 4
Pursue, Pilot, or Park, with readiness and next step

6 **Before you commit** — New
What has to be true, what could stop it, what's still open

PACKAGE CASE

Example: Invoice review canvas

1 Value statement

For invoice review, we're using AI to read each flagged line in context against the full guideline, so that guidelines are applied consistently and real issues surface first, carried by Quality and Risk. Evidence is mixed and readiness is Medium, so we recommend a pilot.

2 Priorities and dimensions

DECISION MAKER GC

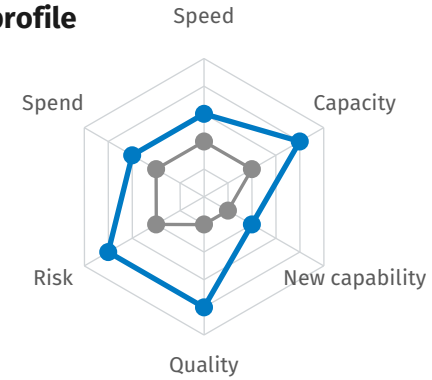
TOP PRIORITIES

1 Quality and consistency
2 Risk and control

DIMENSIONS SCORED

- Speed
- Capacity
- New capability
- Quality
- Risk
- Spend

3 Value profile



Today — With AI

BREADTH 6 of 6 move (2 Directional)

MAGNITUDE 1 Substantial, 2 Moderate, 3 Minor

NOTES Capacity moves Moderate but isn't a priority, so it supports the case rather than carrying it.

4 Primary drivers

Dimension	Today → With AI	Change	Confidence	Why it matters
Quality	Ad hoc → Managed	Substantial	Estimated	Inconsistent calls are the core pain
Risk	Basic → Managed	Moderate	Observed	Shown in a demo on our own invoices

5 Recommendation

Pursue | **Pilot** | **Park**

READINESS **Medium**

NEXT STEP

Run a sample of flagged invoices through both paths; compare reviewer agreement.

6 Before you commit

WHAT HAS TO BE TRUE

Guidelines are written clearly enough to apply consistently

WHAT COULD STOP IT

Reviewers override flags without recording why

STILL OPEN: OWNER, COSTS, FINANCIAL CASE

Owner: Legal ops lead. Costs and financial case in the next 30 days

PACKAGE CASE

Put it into practice: complete your canvas

1. **Copy boxes 2 through 5**

   From Worksheets 1, 2, and 4.

2. **Complete box 6**

   What has to be true, what could stop it, and what's still open.

3. **Write the value statement last**

   For [workflow], we're using AI to [change] so that [benefit], carried by [primary drivers].

5

MINUTES

Canvas

On your canvas

This is your canvas. Take it to your decision maker.

Copilot prompt

NEXT STEPS

Add the financial case to your primary drivers

Use your organization's rates and costs. Convert only the drivers that have a dollar link.

MEASURE
What changes
Review hours a year

BASELINE
A range, with a source
1,800 to 2,200 hours

ASSUMPTION
How much it changes
40% to 60% less effort

IMPACT
What it produces
700 to 1,300 hours redirected

DOLLARS
Only where there's a link
Hours × your loaded rate

Example: capacity, from invoice review

Convert

Hours, spend, and delay that has a known cost. Label capacity as capacity, not savings, unless spend changes.

Keep as the reason

Quality and risk often don't convert cleanly. They explain why the case matters, even when the dollars come from elsewhere.

Then add implementation and ongoing costs to get net value, payback, and ROI in your own model.

CLOSE

Your next steps

1. Replace estimates with system data: volumes, effort, exception rates
2. Test your expected scores with the people who do the work
3. Gather evidence for your change assumptions: references, a trial, or a demo on your own items
4. Bring the one-page canvas to your decision maker with a specific ask

Thank you!

Dana Centola | Travis Ellis | Jen McIver



Wolters Kluwer

Example: Product Value Pitch

Workflow: Write a value pitch for each feature a PM owns **Persona:** Product manager

Dimension	Today	Why	With AI	Why	Change	Confidence
Speed	2 Basic	Pitches get written, but often later than launch planning needs	3 Consistent	A first draft is ready within a standard turnaround	**Minor**	**Estimated**
Capacity	1 Ad hoc	Time spent finding and pulling sources varies widely by PM	3 Consistent	PM effort shifts to reviewing a standard draft	**Moderate**	**Estimated**
New capability	1 Ad hoc	Pitches exist mainly for priority features	3 Consistent	A repeatable pitch for every feature, not just priority ones	**Moderate**	**Directional**
Quality and consistency	1 Ad hoc	Structure and depth depend on who writes the pitch	4 Managed	Same structure every time; evidence gaps flagged before review	**Substantial**	**Observed**
Risk and control	2 Basic	Some pitches cite sources; unsupported claims surface after stakeholders see them	3 Consistent	Every claim linked to its source; traceable on request	**Minor**	**Observed**
Spend control	—	*No budget line is tied to this workflow*	—	*Not scored*	—	—

Not scored: *No spend measure moves, so Spend control stays blank. That's more credible than stretching it.*

Compared with invoice review: *Both move most on Quality. Invoice review moves further on Risk; this workflow moves further on New capability.*

Internal example: our own workflow, scored on the same rubric.

WORKSHEET 1 | DEFINE BASELINE

Define your baseline

WORKFLOW _____ PERSONA _____

1 Today: Current workflow

#	Step (from the user's point of view)	Who/System	Where it slows or breaks
1			
2			
3			
4			
5			
6			
7			
8			

PAIN IN ONE SENTENCE _____

2 The change

STEP THAT CHANGES

WHAT AI DOES

WHAT THE PERSON STILL OWNS

HOW THE SCALE OF WORK CHANGES (how often, how many, how long)

3 Expected benefit

- ☐ Less time or effort
- ☐ Faster completion
- ☐ Better quality or consistency
- ☐ Lower risk
- ☐ Better visibility or decisions

IN ONE SENTENCE _____

WORKSHEET 2 | ASSESS VALUE

Score your workflow

WORKFLOW

Circle one change word and one confidence letter per row

✓	Dimension	Today (1–5)	Why	With AI (1–5)	Why: the assumption	Change	Confidence
☐	**Speed**	1 2 3 4 5		1 2 3 4 5		None Minor Moderate Substantial Major	O E D
☐	**Capacity**	1 2 3 4 5		1 2 3 4 5		None Minor Moderate Substantial Major	O E D
☐	**New capability**	1 2 3 4 5		1 2 3 4 5		None Minor Moderate Substantial Major	O E D
☐	**Quality and consistency**	1 2 3 4 5		1 2 3 4 5		None Minor Moderate Substantial Major	O E D
☐	**Risk and control**	1 2 3 4 5		1 2 3 4 5		None Minor Moderate Substantial Major	O E D
☐	**Spend control**	1 2 3 4 5		1 2 3 4 5		None Minor Moderate Substantial Major	O E D

States: 1 Ad hoc 2 Basic 3 Consistent 4 Managed 5 Optimized **Change by levels moved:** 0 None 1 Minor 2 Moderate 3 Substantial 4 Major

Confidence level: O = Observed E = Estimated D = Directional. Circle one change word and one confidence letter per row. Check two to four dimensions.

Define your rubric

Write your organization's value next to "Yours." Gray examples are illustrative, not benchmarks.

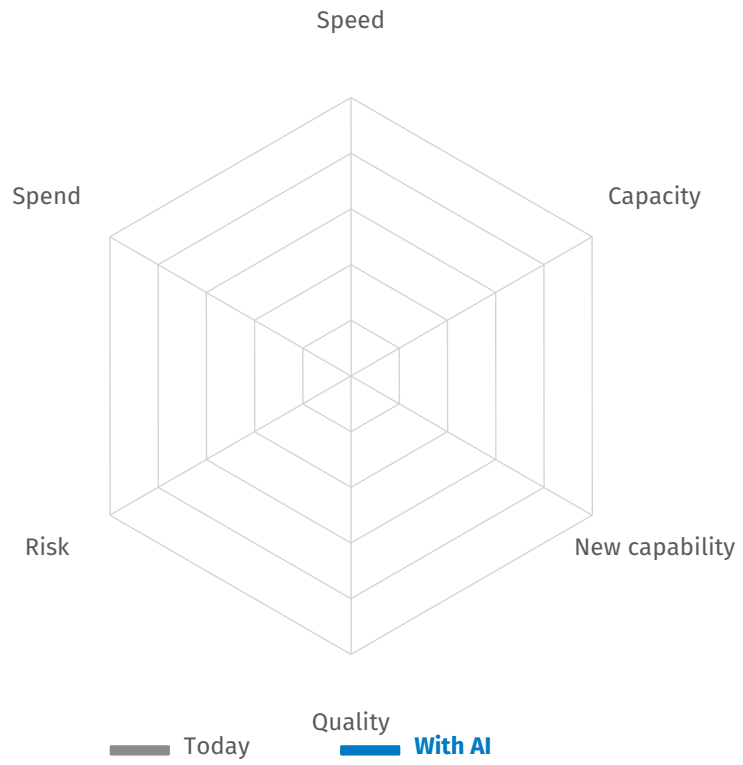
Dimension and measure	1 Ad hoc	2 Basic	3 Consistent	4 Managed	5 Optimized
Speed Measure: *e.g., Days to approval*	Turnaround unknown; work waits in queues	Turnaround tracked; often misses your target **Yours:** *e.g., Over 15 days*	Most items meet your target cycle time **Yours:** *e.g., 10 to 15 days*	Delays flagged early; nearly all items on time **Yours:** *e.g., 5 to 10 days*	Results available on demand; no queue **Yours:** *e.g., Under 2 days*
Capacity Measure: *e.g., Minutes per item*	Effort per item unknown; varies by person	Tools help, but most items get full review **Yours:** *e.g., Most items fully reviewed*	Effort per item steady at your standard **Yours:** *e.g., Standard time known*	Effort goes only to items that need judgment **Yours:** *e.g., About 20% need judgment*	Volume grows X% without added headcount **Yours:** *e.g., Volume up 25%, same team*
New capability Measure: *e.g., New outputs delivered*	Legal delivers only its core service	One-off insight, when someone asks **Yours:** *e.g., Ad hoc reports*	A repeatable new output, such as a recurring report **Yours:** *e.g., One recurring report*	A new service the business relies on **Yours:** *e.g., A service the business uses*	Legal informs decisions it wasn't part of before **Yours:** *e.g., Informs decisions outside Legal*
Quality and consistency Measure: *e.g., Rework rate*	Outcome depends on who does the work	Checklists exist; rework is frequent **Yours:** *e.g., Over 15% rework*	Same standard applied; rework is occasional **Yours:** *e.g., 5 to 15%*	Errors are rare and caught before release **Yours:** *e.g., Under 5%*	Errors below your tolerance; no reviewer variation **Yours:** *e.g., Under 2%*
Risk and control Measure: *e.g., Share reviewed in context*	Review gaps unknown; decisions not recorded	Sample-based review; issues found after the fact **Yours:** *e.g., About 30% sampled*	Coverage defined; decisions traceable on request **Yours:** *e.g., Defined sample*	Full coverage; issues caught before approval **Yours:** *e.g., 100%; rationale recorded*	Controls monitored continuously; audits need no manual prep **Yours:** *e.g., Audit-ready by default*
Spend control Measure: *e.g., Leakage as % of spend*	Spend reviewed only when noticed; leakage unknown	Rules catch obvious violations; most leakage unseen **Yours:** *e.g., Over 5%*	Guidelines enforced on most spend; leakage tracked **Yours:** *e.g., 3 to 5%*	Leakage held under your target **Yours:** *e.g., 1 to 3%*	Spend patterns inform budget and firm decisions **Yours:** *e.g., Under 1%*

Level 1 needs no value. Use the examples during the session; replace them before you share a case, and score Today and With AI on the same version.

WORKSHEET 4 | MEASURE IMPACT

Construct your value profile

A Value profile



Breadth: ____ of 6 move (____ Directional)

Magnitude: ___ Major ___ Substantial ___ Moderate ___ Minor

B Decision maker priorities (from Worksheet 1)

1 _____ **2** _____

C Primary drivers

Dimension	Today → With AI	Change	Confidence	On a priority?
			O E D	Y N
			O E D	Y N

D Readiness

Data	Process	Adoption	Governance	**Overall**
L M H	L M H	L M H	L M H	L M H

E Recommendation

Pursue **Pilot** **Park**

NEXT STEP _____

Pursue: drivers on a priority, Observed, readiness Medium or High. Pilot: drivers Estimated, or readiness Low. Park: no priority fit, or drivers only Directional.

AI WORKFLOW VALUE CANVAS

Workflow: _____

1 Value statement

For _____, we're using AI to _____ so that _____, carried by _____.

2 Priorities and dimensions

DECISION MAKER _____

TOP PRIORITIES

_____

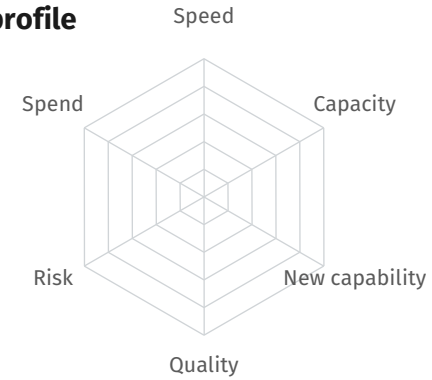
_____

DIMENSIONS SCORED

☐ Speed ☐ Capacity ☐ New capability

☐ Quality ☐ Risk ☐ Spend

3 Value profile



Today **With AI**

BREADTH ____ of 6 move (____ Directional)

MAGNITUDE ___ Major ___ Substantial ___ Moderate ___ Minor

NOTES _____

_____

4 Primary drivers

Dimension	Today → With AI	Change	Confidence	Why it matters
			O E D	
			O E D	

5 Recommendation

Pursue **Pilot** **Park**

READINESS L M H

NEXT STEP

_____

_____

6 Before you commit

WHAT HAS TO BE TRUE

_____

_____

WHAT COULD STOP IT

_____

_____

STILL OPEN: OWNER, COSTS, FINANCIAL CASE

_____

_____

Confidence: O = Observed E = Estimated D = Directional