

## Jylo Use Case Brief

This comprehensive template captures both essential requirements and detailed business analysis for AI implementation planning. It can be used in-house to build your own Playbooks or sent to Jylo to build for you. Fields marked with \* are essential for all use cases, while additional fields provide depth for complex implementations requiring detailed business justification or stakeholder approval.

<b>Firm Name</b>	
<b>Contact Name</b>	
<b>Practice Area</b>	
<b>Jylo Project Name</b>	

### Use Case Overview

<b>Use Case Title *</b>	<i>Allocate a name to the workflow</i>
<b>Use Case Description *</b>	<i>Provide a summary of what you want to achieve</i>
<b>Objectives *</b>	<i>What outcomes does this workflow aim to achieve?</i>
<b>Problem Statement</b>	<i>What specific problem or challenge does this use case address?</i>
<b>Key Success Indicator *</b>	<i>What would the AI process need to achieve in order to be considered successful?</i>

### Current Workflow Analysis

<b>Current Process</b>	<i>Describe how this work is currently performed</i>
<b>Time Investment</b>	<i>How long does the current process typically take?</i>
<b>Frequency</b>	<i>How often is this workflow performed? (daily/weekly/monthly/per matter)</i>
<b>Team Members Involved</b>	<i>Which roles/seniority levels currently handle this work?</i>
<b>Pain Points</b>	<i>What challenges or inefficiencies exist in the current process?</i>

<b>Current Execution Time</b>	<i>How much time does the current process take to execute?</i>
<b>Workflow Frequency</b>	<i>How many times per year is the current workflow carried out?</i>
<b>Cost</b>	<i>Is there a quantifiable cost in person hours, outsourcing cost, software licensing etc associated with this workflow?</i>
<b>Cost per Work Product</b>	<i>If there is a quantifiable cost for executing this workflow, what is this in monetary terms?</i>
<b>Impact</b>	<i>How many users would benefit from access to an AI product that resolves this workflow?</i>

### Proposed Workflow

**Details** *What would the ideal outcome be for an AI process?*

### Workflow Assessment

<b>Repetitive Task</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<i>Is this a frequent task that could save time by automation?</i>
<b>Scale Task</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<i>Is this task to be executed at scale across a large set of documents?</i>
<b>Deep Task</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<i>Is this a task to be carried out across a large document or set of documents?</i>
<b>Constraint</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<i>Is this a specialist task that only limited resources can currently perform?</i>
<b>Sensitivity</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<i>Is this a confidential task that only limited teams are permitted to perform?</i>
<b>Known</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<i>Can the workflow be defined and understood?</i>
<b>Mapped</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<i>Can you map out what the work is?</i>
<b>Documented</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<i>Is there knowledge or documentation to support? Checklist, Issues Lists</i>

### Resource Requirements

<b>AI Expertise</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<i>Is there sufficient AI expertise available to support developing this use case?</i>
<b>SME Expertise</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<i>Is there sufficient subject matter expert capacity available to support developing this use case?</i>

### Input Data Specifications

**Document Types \*** *Contracts, policy documents, certificates etc.*

<b>File Types</b>	<input type="checkbox"/> Word (.docx)	<input type="checkbox"/> Excel (.xlsx)	<input type="checkbox"/> PowerPoint (.ppt)
	<input type="checkbox"/> Email (.msg)	<input type="checkbox"/> PDF	<input type="checkbox"/> Zip files
	<input type="checkbox"/> Email (.eml)	<input type="checkbox"/> Text files	<input type="checkbox"/> Images (text on images)
<b>Input Volume Estimate</b>	<i>How many input documents will typically be processed by AI when executing this workflow?</i>		
<b>Within Context Limit</b>	<i>Is the largest document in the dataset under 750k words?</i>		
<b>Example Data</b>	<i>Are representative test documents available to be used for developing the playbook?</i>		
<b>Source Documents *</b>	<i>Context given to AI prompts e.g. precedents, policies, background knowledge, references, etc.</i>		
<b>Output Documents *</b>			
<b>Deliverable Format</b>	<b>Excel Spreadsheet</b> <input type="checkbox"/>	<b>Word document</b> <input type="checkbox"/>	<b>Integration Output (Via API)</b> <input type="checkbox"/>
<b>Other</b>	<i>Describe the output requirements. If an assembly document is required, please describe or attach your preferred template.</i>		