



Do You Know Where to Use AI for the Biggest Business Impact?

A Practical Guide for Determining
Internal and External AI Use Cases



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Table of Contents

Why Use Case Discovery Matters	4
The Unified Use Case Discovery Framework	4
Establish Processes	5
Brain Dump Ideas Into Internal & External Buckets	6
Map the Customer Journey & Business Processes	7
Capture Structured Use Cases	8
Prioritize Holistically	9
It's Never too Late to Get Started	10

AI transformation is not a matter of technology alone—it starts with discovering the most valuable use cases for your organization. Whether your goal is to automate internal workflows or deliver next-generation customer experiences, the key to success is a systematic, thorough, and inclusive use case discovery process.

Good news: we've compiled a step-by-step guide, applicable to both internal and customer-facing initiatives, ensuring your company's AI investments deliver meaningful, measurable impact.

Why Use Case Discovery Matters

Organizations are eager to harness AI but projects are often scoped around vague ambitions or “shiny” capabilities rather than delivering specific business value. Successful AI transformation begins with identifying the challenges—what’s not working and why? Challenges can be identified in both internal and external processes.

For example:

- Internal Challenges: Automating back-office processes, employee workflows, knowledge management, and operational efficiency
- External Challenges: Enhancing digital products, customer support, personalization, and engagement across apps, websites, and service channels

Here's the catch: everyone has to be on the same page. A unified discovery approach ensures you don't miss high-impact opportunities and establishes a repeatable playbook for scaling AI across your organization.

The Unified Use Case Discovery Framework

There are five key steps to help you and your team identify use cases for AI transformation. First, start by establishing processes. Then, look at the entire landscape of use cases—internal and external—and write down any and all ideas for AI use cases in these two areas. Next, explore the workflows for internal and external practices. Map the brainstormed list of use cases appropriately within these workflows. Then, explore the use cases that exist in these workflows and ask pertinent, structured questions for each and, lastly, based on the previous exercise, prioritize accordingly.

Let's dig in a bit deeper.

Establish Processes

Collecting the use cases is really only half the story. Understanding how to go about getting the inputs needed is the other half.

1. Invite the Right Mix of People:

Product, business, tech, support, marketing, and—for external use cases—customers.

2. Use a Template:

Provide a worksheet or digital form for each use case.

3. Encourage Storytelling:

Ask for real examples, “a day in the life,” and what “great” would look like.

4. Push for Specificity:

Avoid vague or generic descriptions—get to the real workflow, queries, and desired outcomes. (And make sure this is all clearly documented!)

5. Document Nuance:

In the use case discovery and prioritization phase, it's important to capture a summary of the potential unwritten rules, workarounds, and best practices that you'll need to fully document if the project goes into implementation.

Brain Dump Ideas Into Internal and External Buckets

Throw out ideas and see what sticks. Think both broadly and specifically, and don't be afraid to share. As you and your team toss ideas out, start bucketing these use cases across two main domains:

Internal Processes

Consider repetitive, rules-driven tasks (e.g., contract review, HR onboarding, invoice processing, compliance checks) that are creating bottlenecks and slowing processes.

External Processes

Reflect on how customers interact with your business and where repeated, templated interactions can benefit from automation. For example, customer support, intelligent search, digital onboarding, product recommendations, personalization, or in-app assistants.

For product enhancements that are external-facing, think about a wishlist. What would you like your product to one day be able to do? Again, consider the product from the customer perspective and their experience with your product.

Map the Customer Journey and Business Processes

Now, map out the external and internal journeys and pick where use cases from step two could fit within these journeys.

To flesh out external journeys, put yourself in the customers' shoes. Think about how they first interact with your company, what new customer onboarding looks like, continued engagement, customer support, and retention. Consider moments of friction or high potential for delight.

Tip: Don't forget to consider what happens after the customer journey as well. For example, you can also look at causes for customer churn and map use cases to those instances.

For internal use cases it's a bit different. Rather than having to guess where points of friction may be, you have the answers at your fingertips. Talk to various teams to understand where they could use automation or are needing efficiency improvements.

- Tie pain points to specific business processes and workflows.
- Consider both high-volume, repetitive tasks and "long tail" activities that cumulatively drive cost or risk.



Capture Structured Use Cases

Now that you have journeys illustrated and potential use cases mapped to each journey, use the following worksheet—or use the questions in a workshop format—to capture critical information on each use case.

Problem Statement	What is the pain/inefficiency or opportunity?
Who is Impacted?	Internal users (roles/depts) or customer segment
Persona/Segment	Target employee type or customer persona
Sample Questions/Tasks	Typical queries or actions (e.g., "Approve this contract", "Reset password")
Touchpoints/Channels	Where does this occur? (Portal, app, chatbot, support desk, etc.)
Business/Experience Benefit	Time saved, accuracy, satisfaction, revenue, NPS uplift
Volume/Frequency	How often? How many users/transactions?
Current Process/Pain	Description of current workflow, friction points, costs
Potential Risks	What could go wrong? (privacy, accuracy, compliance, brand)
Strategic Priority	How important is this to company goals?
Feasibility	Is needed data/process access available?

Tip: Don't restrict your process to what is easy—push for what's valuable and specific. Use concrete examples, real customer feedback, and analytics to inform the list.

Practical Example: Filling the Worksheet

Field	Internal Use Case Example	Customer-Facing Use Case Example
Problem Statement	Processing expense reports is slow	Customers can't easily get product advice
Who is Impacted?	Finance team	End customers (mobile app users)
Persona/Segment	Accounts payable clerk	New shoppers, returning buyers
Sample Questions/Tasks	"Is this expense valid?"	"What's the best running shoe for me?"
Touchpoints/Channels	Internal portal, email	Mobile app, website chatbot
Business/Experience Benefit	Faster cycle time, cost savings	Higher conversion, improved NPS
Volume/Frequency	200 reports/week	10,000 queries/month
Current Process/Pain	Manual, error-prone	Manual search/filtering, low satisfaction
Potential Risks	Missed fraud, compliance errors	Wrong or biased recommendations
Strategic Priority	Medium	High
Feasibility	Data is available	Need access to support/product content

Prioritize Holistically

Once you've examined each potential use case both internally and externally, you'll have to evaluate how possible it actually is to integrate AI into those instances. Explore each mapped out use case and score or rank based on:

- **Impact:** How will this use case impact business value, customer experience, and revenue or cost savings?
- **Feasibility:** What is your data and process readiness? Is there technical complexity for this integration?
- **Risk:** How will this impact your brand? What compliance or operational implications are there?
- **Strategic Alignment:** Does it advance a key company initiative?

Tip: Prioritize quick wins. Consider starting with simpler, internal automations to develop your AI transformation muscle before proceeding to higher-risk, external-facing projects.

It's Never too Late to Get Started

A disciplined approach to use case discovery is the linchpin of successful AI transformation. By engaging stakeholders and cross-functional teams, structuring your discovery, and focusing on both the customer and internal experience, you lay the foundation for repeatable AI projects that [deliver real value](#) quickly. Start with this framework, and iterate as you learn. The journey to AI maturity begins with asking the right questions and capturing the right details.

For further guidance, templates, or workshop facilitation, [contact us directly](#) or [schedule a demo](#).