

Value Orchestration Workbook.

A working document for the person who has to turn AI demand into value that can be seen. One partner area, one quarter, three value conversations. It saves as you type, on this device only, and prints to a clean PDF for the review.

FOR

Business Relationship Managers,
value and benefits owners,
demand and portfolio leads

TAKES

About ninety minutes the first
time; twenty minutes a month
after that

USE WITH

Toolkit canvases 06, 09, 18 and
19, and the AI Value Associate
micro-course

SAVES

In your browser as you type;
export a copy before you clear it

BEFORE YOU START

How to use this workbook

- **Pick one partner area and one quarter.** The workbook is built for a quarter. A year is too long to correct and a week is too short to measure.

- **Work the pages in order the first time.** After that, go straight to whichever value conversation is next.
- **Write numbers as ranges with conditions, in the partner's unit.** Hours a week, cases a month, days of cycle time, or money. A number with no condition attached is a promise you did not agree to keep.
- **Name a person in every owner box.** A team name is not an owner. Nobody in a team answers for a number.
- **Print it for the review, and export a copy before you clear it.** Everything you type stays in this browser.

Partner area

Partner area or directorate

Quarter

For example Q4 2026

Completed by

Your name and role

Value map: one line from ambition to value

List the AI demand in this partner area, live or proposed, up to six items. For each, name the organisational ambition it serves, write the item as a need sentence with no tool in it, say which gate it is at, and record the committed value, its owner and the state of the evidence.

If a row has a tool in the demand column and nothing in the ambition column, it has not been shaped yet. Send it back to the front door before it goes any further.

	AMBITION IT SERVES	DEMAND ITEM (NEED, NO TOOL)	GATE	COMMITTED VALUE	BUSINESS OWNER	EVIDENCE
01	Ambition it serves	Demand item, as a need sentence with no tool in it	Gate	Range and unit	Owner	Evidence
02	Ambition it serves	Demand item, as a need sentence with no tool in it	Gate	Range and unit	Owner	Evidence
03	Ambition it serves	Demand item, as a need sentence with no tool in it	Gate	Range and unit	Owner	Evidence
04	Ambition it serves	Demand item, as a need sentence with no tool in it	Gate	Range and unit	Owner	Evidence

	AMBITION IT SERVES	DEMAND ITEM (NEED, NO TOOL)	GATE	COMMITTED VALUE	BUSINESS OWNER	EVIDENCE
05	Ambition it serves	Demand item, as a need sentence with no tool in it	Gate ▼	Range and unit	Owner	Evidence ▼
06	Ambition it serves	Demand item, as a need sentence with no tool in it	Gate ▼	Range and unit	Owner	Evidence ▼

The three value conversations

Value is not agreed once. It is agreed before commit, measured after handover and revisited at the review, and each of those is a different conversation with a different question at its centre. Plan all three for this quarter: who you will have them with, when, the evidence you will bring and the decision each one has to produce.

Value planning

BEFORE COMMIT

"What is the lowest figure you would still act on, and what has to be true for the upper half to arrive?"

WITH WHOM

Sponsor, business owner, finance

WHEN

dd/mm/yyyy



EVIDENCE I WILL BRING

Range, conditions, counterfactual, alternatives

THE DECISION IT PRODUCES

Commit, wait, or decline, with reasons

Value realisation

AFTER HANDOVER

"What did we measure, against what we committed, and who is answering for the gap?"

WITH WHOM

Business owner, measurement owner

WHEN

dd/mm/yyyy



EVIDENCE I WILL BRING

Measured figures beside the committed range

THE DECISION IT PRODUCES

Who answers for the gap, and the corrective trigger

Value optimisation

AT THE REVIEW

"Which of these do we scale, fix or stop, and what goes back to the front door as a lesson?"

WITH WHOM

Leadership, front door

WHEN

dd/mm/yyyy



EVIDENCE I WILL BRING

The ledger, the leak map, the lesson

THE DECISION IT PRODUCES

Scale, fix or stop, and what goes back to the front door

Value leak map

Value goes missing at predictable places, one at each gate. For each leak, write the symptom you actually see in this partner area, the item where it is happening now, the fix, and who owns the fix by when. Leave a row blank if you genuinely cannot find the leak; do not invent one to fill the page.

A fix that only works while you personally chase it is not a fix. It is a leak with a person standing in it.

LEAK	SYMPTOM YOU SEE	WHERE IT IS HAPPENING NOW	THE FIX	OWNER	BY WHEN
Built to the wrong need Discover: the request was taken as the need	Symptom you see	Item where it is happening now	The fix	Owner	dd/mm/y📅
Committed without evidence Assess: readiness scored on hope, not on what was seen	Symptom you see	Item where it is happening now	The fix	Owner	dd/mm/y📅
Ranked by volume or by voice Prioritise: not by value against the whole portfolio	Symptom you see	Item where it is happening now	The fix	Owner	dd/mm/y📅

LEAK	SYMPTOM YOU SEE	WHERE IT IS HAPPENING NOW	THE FIX	OWNER	BY WHEN
No owner and no number at commit Design: funded without anyone to answer for it	Symptom you see	Item where it is happening now	The fix	Owner	dd/mm/y📅
Deployment mistaken for use Adopt: log-ins counted, behaviour unchanged	Symptom you see	Item where it is happening now	The fix	Owner	dd/mm/y📅
Month nine never happens Realise: the review is never booked, so the number is never tested	Symptom you see	Item where it is happening now	The fix	Owner	dd/mm/y📅

Attention allocation

Relationship attention is the scarcest thing you have, and it concentrates where the noise is rather than where the value is. Place this quarter's items in the four boxes, then write the routing rules that decide, in advance, what a person handles and what is routed elsewhere.

High value, high attention

PROTECT

Items

High value, low attention

MOVE ATTENTION HERE

Items

Low value, high attention

ROUTE OR STOP

Items

Low value, low attention

LEAVE ALONE, REVIEW QUARTERLY

Items

A person handles it when

For example: the need is unclear, the value range is above a threshold, or a senior relationship is at stake

It goes to self-service or automation when

For example: the request matches a published pattern and the readiness score is above the line

It is declined, with reasons, when

For example: the counterfactual is acceptable for a year, or the need sentence will not close

Value evidence ledger

One row per committed benefit. Write the unit and the baseline before anything else, then the committed range, then what has been measured so far. Say plainly whether a figure is measured or estimated, and write avoided cost in the same row as the spend it is set against, never on its own.

An estimate that has sat in the ledger for two reviews without becoming a measurement is telling you something about ownership.

	BENEFIT	UNIT	BASELINE	COMMITTED RANGE	MEASURED SO FAR	BASIS	MEASUREMENT OWNER	NEXT REVIEW
01	Benefit	Unit	Baseline	Committed range	Measured so far	Basis ▼	Owner	dd/mm/yy
02	Benefit	Unit	Baseline	Committed range	Measured so far	Basis ▼	Owner	dd/mm/yy
03	Benefit	Unit	Baseline	Committed range	Measured so far	Basis ▼	Owner	dd/mm/yy
04	Benefit	Unit	Baseline	Committed range	Measured so far	Basis ▼	Owner	dd/mm/yy

	BENEFIT	UNIT	BASELINE	COMMITTED RANGE	MEASURED SO FAR	BASIS	MEASUREMENT OWNER	NEXT REVIEW
05	Benefit	Unit	Baseline	Committed range	Measured so far	Basis ▼	Owner	dd/mm/yy
06	Benefit	Unit	Baseline	Committed range	Measured so far	Basis ▼	Owner	dd/mm/yy

Avoided cost, beside spend

Write each avoided cost next to the spend it offsets, with the basis for the figure

Thirty-day value plan

Three moves, no more. Each belongs to one of the value conversations and fixes one gate. Write the first action small enough to do this week, and the evidence that would show it worked.

	THE MOVE	CONVERSATION	GATE IT FIXES	FIRST ACTION	EVIDENCE OF PROGRESS	DATE
01	The move	Conversation	Gate it fixes	First action	Evidence of progress	dd/mm/y
02	The move	Conversation	Gate it fixes	First action	Evidence of progress	dd/mm/y
03	The move	Conversation	Gate it fixes	First action	Evidence of progress	dd/mm/y

Monthly value review

Run the review with the ledger open. Tick each question once it has been asked out loud and answered, then record what was decided.

- ☐ Which committed numbers gained a measurement this month, and which are still estimates?
- ☐ Which item moved through a gate, and did the reasons hold up afterwards?
- ☐ Where did attention go this month that value did not justify?
- ☐ Which leak showed up again, and is the fix systemic or personal?
- ☐ What did the most recent month-nine review send back to the front door?
- ☐ Which alternative to a build was taken seriously enough to have an owner and a cost?
- ☐ What is the one value decision for the next thirty days?

	OBSERVATION OR DECISION	EVIDENCE	OWNER AND NEXT ACTION
01	Observation or decision	Evidence	Owner and next action
02	Observation or decision	Evidence	Owner and next action

	OBSERVATION OR DECISION	EVIDENCE	OWNER AND NEXT ACTION
03	Observation or decision	Evidence	Owner and next action

Value orchestration is not the job of filling in boxes. It is the habit of asking, at every gate, what this is for, what it is worth in the partner's unit, and who will answer for it after launch. The workbook exists to make that habit visible to the people who fund the work.

The GOVBRM Value Orchestration Workbook is part of the AI Demand Toolkit and is free to use, print, adapt and share for your own or your organisation's internal use. Grounded in the BRM Body of Knowledge (BRM Institute). A generic model: adapt the gates and scales to your own governance.

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