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# AI Implementation Checklist

A practical checklist for customizing and implementing AI for a specific business use case.

Use this checklist before you invest in tools, build automations, or roll out a larger AI initiative.

## 1. Define the Business Problem

- Can you describe the business problem in plain language?
- Is the issue tied to delays, inconsistency, repetitive work, or missed visibility?
- Can you estimate the current cost of the problem in time, money, or risk?
- Do you know who owns this process today?

## 2. Map the Current Workflow

- Document where the process starts and ends.
- List the systems, tools, and data sources involved.
- Mark each handoff, bottleneck, and manual step.
- Identify where human judgment is required and where rules are repeatable.

## 3. Choose the Right Use Case

- Select one focused use case rather than a broad transformation.
- Prioritize opportunities that can save time, reduce errors, or improve consistency.
- Make sure the first use case has a clear owner and measurable outcome.
- Confirm that the use case matters enough to justify implementation effort.

## 4. Review Your Data

- Identify what data the AI solution will need.
- Check whether that data is accessible, current, and reasonably clean.
- Flag missing fields, duplicate records, or inconsistent naming.
- Confirm whether sensitive or regulated data is involved.

## 5. Pick the Right Solution Type

- Decide whether the need is automation, an assistant, analytics, or a custom system.
- Do not force one tool to solve every problem.
- Match the solution to the workflow, not the trend.

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- Consider how much change the team can realistically absorb.

## 6. Define Success Metrics

- Choose the metrics you will use to judge success before launch.
- Track items such as time saved, cycle time, cost reduction, error rate, or response speed.
- Set a baseline so you can compare results after implementation.
- Choose a review date for evaluating progress.

## 7. Plan the Rollout

- Start with a small pilot or limited deployment.
- Clarify who will test, approve, and maintain the solution.
- Document what happens if the AI output is wrong or incomplete.
- Create a simple training plan for the people using the solution.

## 8. Review Risk and Governance

- Define where human review is required.
- Set rules for data access, approvals, and escalation.
- Document known limitations and failure points.
- Make sure someone is responsible for ongoing oversight.

## 9. Improve After Launch

- Review performance against the baseline metrics.
- Collect feedback from the people using the workflow.
- Adjust prompts, rules, integrations, or inputs as needed.
- Expand only after the first use case is stable and clearly valuable.