

## Artificial Intelligence Project Checklist

### Strategic Planning & Goal Setting

- Define Your Organization's AI Vision: Identify specific business problems or inefficiencies that AI can solve.
- Set Measurable Objectives: Think through how you will measure the success of AI initiatives.
- Develop an AI Roadmap: Create a phased plan outlining ownership, timelines, resources, and pilot project phases.



### Data and Technology Readiness

- Prepare Data: ID what data is needed and make sure it is accessible, organized, and high-quality.
- Select The Right Tools: Choose AI solutions that align with existing infrastructure and meet your organization's requirements for privacy, security, and compliance. Don't overlook user friendliness.
- Assess Tool Interoperability: Ensure new AI tools can integrate with current systems, especially those integral to each project's success (CRM, accounting, etc.)



### People and Organization

- Build a Cross-functional Team: Involve IT, HR, legal, and operational staff to ensure comprehensive, responsible deployment. Make sure each project has a champion at the executive level.
- Don't Overlook Training: Teach employees to use AI tools effectively and safely. Not everyone will be an evangelist, so allow time for different learning curves.
- Change Management: AI tools are often a blend of new tech and adjustments to business processes, so be transparent about goals, potential challenges, and the value of tackling changes to the existing environment. (Remember to share what's in it for users, not just the company)



### Implementation and Governance

- Start with Small Use Cases: Test AI tools in limited, low-risk, high-value scenarios before full-scale implementation. Don't rush deployment until the quirks are worked out.
- Implement a Clear AI Policy: Establish ethical guidelines for fairness, accuracy, data privacy, and bias monitoring.
- Monitor and Revise Regularly: Continuously evaluate AI tools and projects for performance, accuracy, and impact on business processes, making adjustments as needed.



### Sustainability

- Encourage Shared Experiences: Foster an environment where employees collaborate and share tips and tricks.
- Scale Slowly: Use successful pilots to inform and guide AI initiatives across the organization.

