AI Strategy Kickstart Checklist: Everything You Need to Plan Your First AI Integration

A practical, no-fluff checklist to help business leaders design and deploy impactful AI solutions quickly and effectively.

1. Identify Your Business Bottlenecks

- Which tasks are repetitive and manual?

- Where are your biggest delays or costs?

2. Gather and Review Existing Data

- What data do you already have?

- Is it clean, organized, and accessible?

3. Define Success Metrics

- What would success look like after AI deployment?

- Choose KPIs: Time saved, error reduction, revenue impact

4. Involve Key Stakeholders Early

- Identify departments affected by AI integration

- Get input from IT, operations, finance, and compliance

5. Choose the Right AI Use Case

- Start small (e.g., chatbot, report generation, document analysis)

- Focus on measurable ROI in 60–90 days

6. Find the Right AI Partner

- Evaluate experience in your industry

- Look for agile, hands-on teams that offer pilot support

7. Prepare for Continuous Iteration

- Set up feedback loops with internal users

- Plan monthly performance reviews of the AI solution