automation
hero_

A step-by-step guide

AI Project Implementation

Nearly half of companies want to implement artificial intelligence (AI) projects for various teams in their company. But it can be unclear where to start those projects or what's important to consider before taking them on.

By using the following worksheets, you can ensure that your AI initiative is successful. In the worksheets, you'll see six steps to guide you through your implementation journey. You can either print out each sheet or use them electronically. Best of luck as you embark on your AI implementation project.

Step 1: Create a strategy

Use this strategy worksheet for reference during the whole implementation process. Meet with critical project decision makers to complete this page, collecting information as you go.

Mark the items on the to-do list as complete once all items on the associated worksheets are done.

Goals of Implementation:

_____

_____

Rank Project Priorities (1-3):

Cost: _____ Speed: _____ Scope: _____

Project Timeline:

Start date: _____ End date: _____

Budget Range:

_____

To-Do List:

Create Strategy   Use Case Discovery   Market/Vendor Research   Audit Data   Implementation & Installation Plan   Change Management Plan

Existing Systems Involved in Implementation:

_____

_____

_____

Teams Involved in Implementation:

_____

_____

_____

Potential Obstacles:

Obstacle: _____ Obstacle: _____ Obstacle: _____

Prevention: _____ Prevention: _____ Prevention: _____

Post implementation:

Who will review KPIs? _____ How often will they be reviewed? _____ Who owns system maintenance? _____

ROI Measurement:

Set date to measure ROI*: _____

*Set a calendar reminder for this date.

Step 2: Use Case Discovery

To identify potential AI use cases, list your organization's biggest process pain points and potential applications and use cases for AI. Give a value score to each use case based on the impact it would have on your organization. Then give an effort score based on ease of implementation.

Add the two scores together and rank them by highest score. It may be best to discover use cases with one whole team, or perhaps a group inside that team, to gain perspective on their pain points and process steps.

Take the three highest-ranking use cases. Start performing market research to create a short list of vendors that offer a platform suited to the use cases you've chosen, and begin reaching out to see demos and ask questions.

Biggest Pain Points:	Potential AI Use Cases:	Value Score: highest value = 10	Effort Score: lowest effort = 10	Overall Score:	Ranking:

Step 3: Vendor Selection

Take some time to research vendors that offer the use cases you identified in the previous exercise. Ask the questions below to fully understand the product features and purchase/installation process.

Use the blank spaces to fill in questions specific to your industry, use cases or company. For best results, make multiple copies of this sheet and fill in each vendor's answers to the questions. Compare answers after speaking to all potential providers.

Questions to ask:

How does your platform address XYZ use case?

How will this affect my current business process?
Does it add or eliminate steps from my current process?

How will this product integrate with my other tools?

What is the installation process?

What is the learning curve for the end user?

What types of data/tools does your product need to work?
Which types of data/tools does this solution need to have access to?

What security measures are built into your product?

What are the next steps for implementation?

Answers:

Step 4: Audit Sales Data

For any AI tool to properly work, it must be fed clean and accurate data. Perform an audit of your company data by asking yourself these "Yes" or "No" questions. Once you understand the state of your data, determine if you'll need to improve its quality for the new solution you purchased.

Some AI solutions require data to be in pristine condition, while others can boost the quality of your data. Should you have answered yes to any of these questions, consider an AI tool that will increase your data quality and automate data collection and organization.

Use this audit to set a baseline for your data as well and compare quality after implementing your AI solution.

Data Quality:

Is 80% of your data duplicates?

Yes   No

Are you missing a significant amount of data?

Yes   No

Is there varying details for accounts/contacts?

Yes   No

Data Collection/ Storage:

Is any of your data collected manually?

Yes   No

Is it collected inconsistently?

Yes   No

Is all the data stored in different places?

Yes   No

If yes, where is the data stored?

Data Security:

Speak with your IT and legal teams understand security requirements.

Step 5: Implementation & Installation

Once an AI solution is lined up and implementation is in motion, ensure you have stakeholders sign off. List all people or teams that need to approve the solution's implementation and track the status of that buyoff. Also list the systems to be integrated with the tool once installed/set up. List who's in charge of integration and the status as it's completed.

Stakeholder sign off: Team/ Individual:	Status*: 1 2 3	Systems to integrate:	Who owns integration?	Status*: 1 2 3

*Status: 1 = To Be Completed / 2 = In Progress /
3 = Done

Step 6: Change Management

After all technical aspects of installation are complete, get your team aligned. End users should have a clear grasp of the project's benefits and how it will bring value to their role; communicate this before training, and help them understand why this project is important.

List who needs to be trained on the new tool and the status of these items. Finally, ensure that you have a check-in set to ensure that adoption is running smoothly and that feedback loops are in place.

At the end of your implementation, revisit your KPIs and ROI calculations to ensure the tool is meeting your needs and exceeding your prior benchmarking. See your strategy worksheet for post-implementation data.

Change Management Strategy:	Teams/ Individuals to be aligned and trained:	Status*: 1 2 3	Metric check-ins for teams: Frequency:	Format:
Alignment on goals, benefits, and value of project				
Teams trained and learning measured				
Metrics/ feedback check-ins established				
New onboarding process				

*Status: 1 = To Be Completed / 2 = In Progress
3 = Done