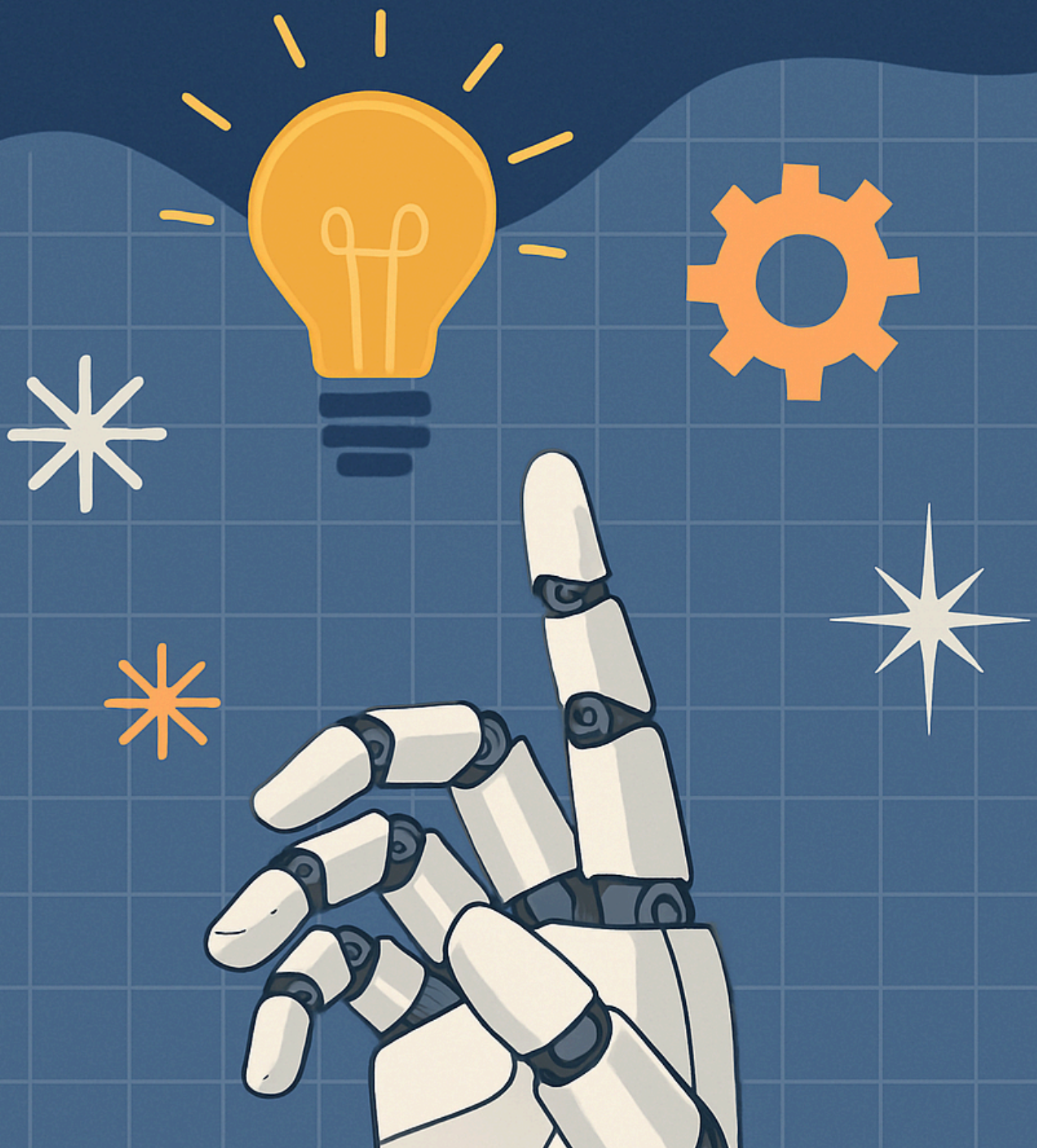


# THE COMPLETE CHECKLIST

## AI AND AUTOMATION 2025

This checklist helps you identify, document and measure basic workflow to AI agency to help you thrive in today's fast-evolving technological landscape, aiding you in assessing your business in terms of technology and innovation through to execution





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Phase 5: Scaling -  
How much more can you do?

# LOOK

## MORE FREE STUFF

### Is your business technology working for you or against you?

Our free self-assessment tools help you identify strengths, weaknesses, and opportunities across your technology landscape - no technical expertise required.

[Take the Free Assessment →]



Discover where you stand on:

- Cloud optimization & cost control
- Security posture & zero trust implementation
- Data integration & analytics readiness
- Business process automation opportunities
- AI implementation potential

**Five minutes today could save you thousands tomorrow.**

**No email required to get started.**



More Information here too  
**consultantsguides.com**

# Phase 0: Engage

## Partner with an outside thinker

- ☐ Can they support the business process mapping
- ☐ Do they niche down to your industry and business needs?
- ☐ Do they have a portfolio of offerings that hit the 80/20 rule?

# Phase 1: Assessment & Strategic Planning

## Identify / Ideate - What matters most?

- ☐ Business process mapping / map out workflows and tasks with steps
- ☐ Prioritize processes would likely benefit from automation or agency from AI
- ☐ Classify tasks that require precision. Low (90% accuracy acceptable) or High (near-perfect accuracy required [such as refunds])
- ☐ Prioritize low precision, high-frequency tasks for initial pilot
- ☐ Document current time, human effort or intensity of tasks relative to their strategic value
- ☐ Identify which processes cause the most employee frustration or burnout
- ☐ Assess alignment with organizational strategic goals and KPIs
- ☐ Consider both internal operations and customer-facing opportunities



# Phase 1: Assessment & Strategic Planning

## Your Data Estate - Data is king and the AI needs its grapes

- ☐ Map/document all of your data locations, type, importance and integrations (overlay with prior business process map)
- ☐ Document integration needs, catalog API's and data exchange
- ☐ Understand quality of data and system of record
- ☐ Map data sources and determine structure
- ☐ Evaluate whether historical data exists for training and testing
- ☐ Identify data gaps that need to be addressed before implementation

## Risk Assessment - Nuff said

- ☐ Conduct thorough risk analysis for each potential implementation
- ☐ Document potential failure points and mitigation strategies
- ☐ Assess regulatory and compliance implications
- ☐ Evaluate potential impacts on customers and stakeholders
- ☐ Identify cybersecurity considerations and risks
- ☐ Consider ethical implications of automation decisions
- ☐ Develop contingency plans for system failures

## Define Success Metrics - How do we know this worked?

- ☐ Record baseline metrics for current performance (expand from phase 1)
- ☐ Define specific efficiency targets (time saved, volume processed)
- ☐ Establish quality metrics (accuracy, error rates)
- ☐ Identify business impact indicators (revenue influence, customer satisfaction)
- ☐ Set timeline expectations for ROI realization
- ☐ Create measurement frameworks for both quantitative and qualitative outcomes
- ☐ Define specific thresholds for success vs. failure
- ☐ Develop dashboard to show metrics and KPI's

# Phase 2: Implementation Planning & Execution

## Start Small - I'm a pilot, are you?

- ☐ Select a useful area of focus for initial pilot
- ☐ Create detailed Automation Requirement Document for the workflow
- ☐ Define clear boundaries for agent responsibilities
- ☐ Set specific success criteria for the pilot project
- ☐ Identify a receptive team or department for the pilot
- ☐ Set realistic timelines with buffer for unexpected challenges
- ☐ Create a small, nimble project team with clear ownership

## Technology - What makes sense?

- ☐ Partner with a consultant or automation engineer
- ☐ Evaluate low-code, no-code, and custom development
- ☐ Select suitable AI models and technology platforms for your use case
- ☐ Evaluate system's ability to grow and handle increased workloads
- ☐ Evaluate open source vs. proprietary solutions
- ☐ Consider infrastructure requirements (cloud vs. on-premises)
- ☐ Assess total cost of ownership beyond initial implementation

## In the middle - Check and Balances

- ☐ Implement quality control procedures for AI-generated content
- ☐ Design structured pathways for handling edge cases and exceptions
- ☐ Develop authorization frameworks for critical decision points
- ☐ Map out specific touchpoints requiring human intervention
- ☐ Define decision authority boundaries (what can the AI decide vs. humans)
- ☐ Develop monitoring dashboards for human supervisors
- ☐ Create feedback mechanisms for continuous improvement

# Phase 2: Implementation Planning & Execution

## Change Management - Driving Adoption

- ☐ Develop internal communications strategy about AI implementation
- ☐ Address employee concerns about job displacement proactively
- ☐ Create training programs for employees working alongside AI
- ☐ Identify and engage key stakeholders and champions
- ☐ Plan for organizational resistance and develop mitigation strategies
- ☐ Document how roles will evolve, not disappear
- ☐ Create regular touchpoints for feedback and adjustment

## Test Thoroughly - Does it work?

- ☐ Develop comprehensive test cases using past data
- ☐ Test edge cases and unusual scenarios
- ☐ Create "red team" scenarios to test for potential failures
- ☐ Execute controlled simulations in sandbox environments
- ☐ Involve end-users in testing to identify practical issues
- ☐ Evaluate AI performance against established human standards
- ☐ Resolve any performance issues prior to production release



## Excerpt

You can grab this, but since this is about AI, I've included a snapshot in the next few pages



Not all technology investments deliver equal value. Here's what truly matters for business impact:

- **Cloud Optimization** – Most organizations using Microsoft Azure or similar platforms can reduce cloud costs by 20-34% through proper management while improving performance.
- **Integrated Business Systems** – Breaking down data silos between departments creates a unified view of operations and customers, enabling faster, better-informed decisions.
- **Automation of Routine Processes** – Low-code platforms like Microsoft Power Platform, Zapier, N8N allow companies to automate workflows that previously consumed hundreds of employee hours.
- **Security That Enables Business** – The right security approach doesn't just protect—it enables new business models and customer experiences while maintaining compliance.

**But let's take a look at practical AI....**



## The Intelligent Enterprise: Practical AI Implementation for Business Value

### Beyond the Hype: AI as a Business Tool

Artificial intelligence has moved from science fiction to business reality, yet many organizations struggle to translate AI potential into tangible outcomes. The landscape is cluttered with pilot projects that never scale, costly initiatives with unclear returns, and growing skepticism about AI's practical value.

The problem isn't the technology itself but how organizations approach it. The most successful companies view AI not as a magical solution or a technology project, but as a powerful tool to solve specific business problems and create competitive advantage.

### The AI Value Gap

Despite massive investment, many organizations face an AI value gap:

- 87% of AI projects never make it from pilot to production
- Companies report spending millions on AI initiatives without measurable returns
- Data quality and integration issues derail promising use cases
- Organizational resistance undermines adoption and impact

Closing this gap requires a more pragmatic, business-focused approach to AI implementation that works across your technology ecosystem.

## Building AI That Delivers Business Results

### 1. Start with Problems, Not Technology

Successful AI begins with clear business challenges rather than technology capabilities.

**Action Item:** Identify high-value opportunities by:

- Documenting specific business problems with quantifiable impact
- Prioritizing use cases based on value potential and feasibility
- Establishing clear success metrics tied to business outcomes
- Securing stakeholder alignment on objectives and approach

This business-first approach works regardless of which AI platforms you ultimately deploy, ensuring your investments address real needs rather than showcasing technology.

### 2. Assess Your Data Readiness

AI is only as good as the data that feeds it. Many projects fail before they begin due to data quality issues.

**Action Item:** Evaluate data readiness through:

- Quality assessment of relevant data sources
- Analysis of data completeness and consistency
- Identification of integration requirements between systems
- Examination of data governance and compliance considerations

This assessment should be platform-agnostic, focusing on business data quality rather than specific technology constraints.

### 3. Choose the Right Implementation Approach

Not every AI opportunity requires custom model development or advanced data science.

**Action Item:** Select the most efficient path to value:

- Evaluate off-the-shelf AI capabilities in your existing platforms
- Consider pre-built AI services for common use cases
- Assess low-code AI tools for business-led implementation
- Reserve custom development for truly unique requirements

Most organizations can capture significant value through the AI capabilities already embedded in Microsoft 365, and major business applications, reserving custom development for specialized needs.



## Building AI That Delivers Business Results

### 4. Build for Integration

AI solutions deliver the most value when integrated into existing workflows rather than operating as standalone tools.

**Action Item:** Design for seamless integration by:

- Embedding AI capabilities into existing business applications
- Ensuring outputs flow directly into decision processes
- Creating consistent user experiences across platforms
- Developing APIs and connectors for cross-system intelligence

This integration-first approach ensures AI becomes an invisible, frictionless part of how work gets done rather than another system users must learn and access.

### 5. Develop an AI Governance Framework

As AI touches more aspects of your business, governance becomes critical for managing risk and ensuring responsible use.

**Action Item:** Establish governance mechanisms that:

- Ensure ethical use of AI across the organization
- Provide oversight for algorithm bias and fairness
- Maintain compliance with relevant regulations
- Create transparency in how AI makes or supports decisions

Effective governance works across all AI implementations regardless of platform, creating consistent standards while enabling innovation.

# Practical AI

## The Human Factor: AI Change Management

AI implementation is as much about people as technology. Success requires thoughtful attention to how AI changes work.

**Action Item:** Develop a change approach that:

- Addresses fears and misconceptions about AI
- Clearly communicates how AI will augment rather than replace human work (initially)
- Provides training that focuses on working effectively with AI tools
- Redesigns roles and processes to capture AI-enabled efficiencies
- Help them understand that these skills will support their ability to transition to new work styles

Organizations that treat AI as a collaborative technology rather than a replacement for human judgment see significantly higher adoption and impact.

## From Experiments to Transformation: Scaling AI Success

Individual AI projects can deliver value, but the true potential lies in enterprise-wide transformation.

**Action Item:** Create a scaling strategy that:

- Leverages lessons from successful pilots
- Builds reusable components and patterns
- Develops internal AI capabilities and expertise
- Creates a portfolio approach to AI investment

This scaling approach should work across your technology ecosystem, allowing successful patterns to be replicated regardless of the underlying platforms.

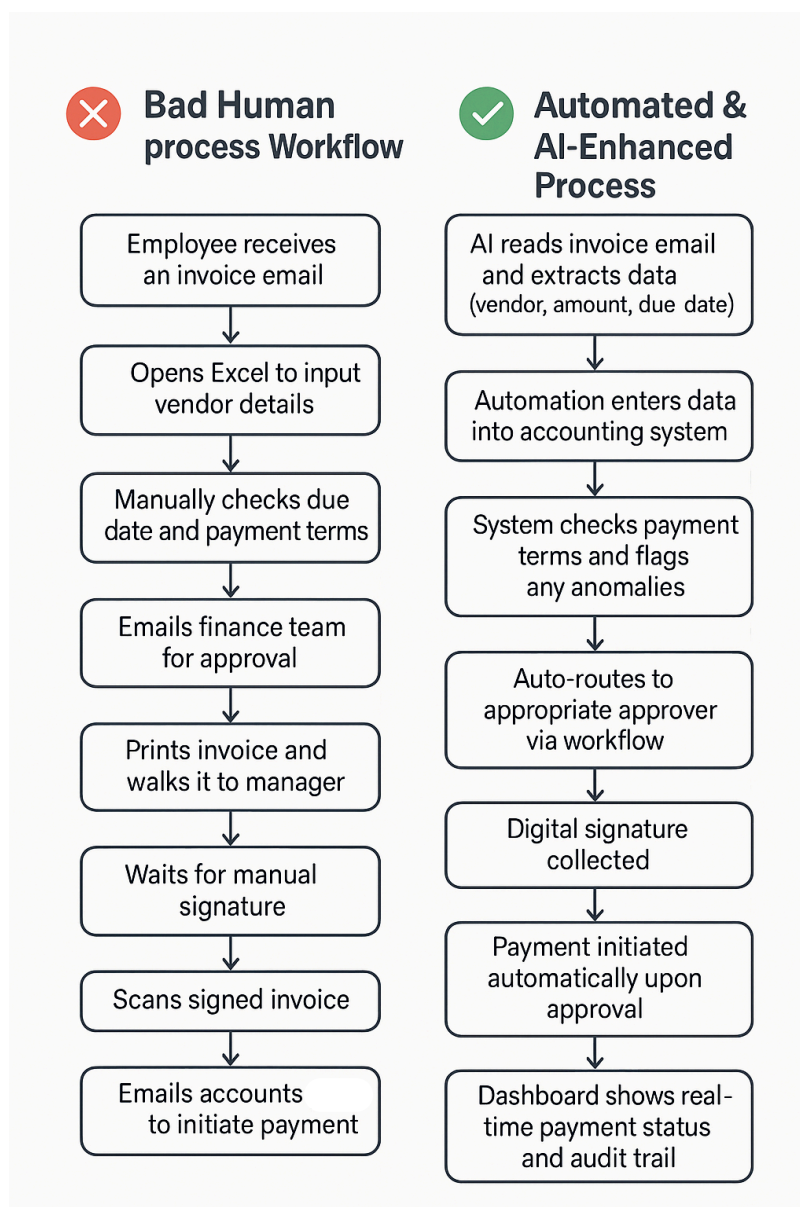
# Practical AI

## Getting Started: Practical First Steps

Building AI capabilities doesn't require massive upfront investment. Begin with these pragmatic steps:

1. Inventory existing AI capabilities in your productivity and business platforms—you likely already have powerful tools at your disposal.
2. Identify one high-impact, achievable use case where AI could solve a specific business problem with clear ROI.
3. Start with available data rather than launching major data quality initiatives—work with what you have while improving data assets.
4. Focus on augmentation, not automation for initial projects to build trust and demonstrate value.
5. Measure outcomes rigorously to build the case for further investment.

The organizations capturing the most value from AI aren't necessarily those with the most advanced technology or the largest data science teams—they're those that focus relentlessly on solving real business problems and improving human outcomes.





# LOOK

## MORE FREE STUFF

Various tools, checklists and whatever else



# Phase 3: System Integration & Deployment

## Design User Experience - Iterate for UI/UX

- ☐ Create intuitive interfaces for human-agent interaction
- ☐ Provide appropriate visibility into agent activities
- ☐ Balance automation with human control
- ☐ Consider user feedback mechanisms
- ☐ Optimize for accessibility and diverse user capabilities
- ☐ Create guidance documentation and help resources
- ☐ Implement progressive disclosure of AI capabilities to avoid overwhelming users

## Ensure Security - Breach?

- ☐ Conduct comprehensive security assessment of agent access and implement appropriate permissions
- ☐ Document and enforce security protocols for all agent operations
- ☐ Perform final security review with stakeholders before deployment
- ☐ Perform penetration testing on AI systems
- ☐ Create protocols for addressing prompt injection attacks
- ☐ Implement regular security audits of AI systems

# Phase 3: System Integration & Deployment

## Establish Data Access - Deny by default

- ☐ Establish secure access to data sources
- ☐ Finalize map and document all data flows and utilization
- ☐ Implement robust authentication protocols
- ☐ Place API's and accounts in password vaults
- ☐ Create data update/refresh protocols
- ☐ Implement data quality monitoring

## Connect to Workflows - Let's flow

- ☐ Connect AI-generated outputs to established business systems
- ☐ Verify system interoperability with existing software and tools
- ☐ Establish smooth transitions between automated processes and human workflows
- ☐ Design implementation to maintain operational continuity
- ☐ Develop fallback procedures for when integration points fail
- ☐ Create automated alerts for integration issues
- ☐ Document the entire workflow with clear ownership transitions



# Phase 4: Measurement & Optimization

## Performance - How is it going?

- ☐ Measure and compare time baseline vs time saved
- ☐ Monitor volume and error rates
- ☐ Compare consistency and accuracy to human benchmarks
- ☐ Track resource utilization and productivity improvements
- ☐ Monitor for bias in AI decision-making
- ☐ Now you have data, implement automated quality and sampling
- ☐ Identify opportunities for tweaking
- ☐ Document all performance improvements for stakeholder reporting

## Business Impact - Is it meaningful?

- ☐ Assess revenue impact and calculate ROI based on costs and benefits
- ☐ Monitor customer satisfaction metrics (Net Promoter Score etc)
- ☐ Track employee experience and productivity improvements with agent collaboration
- ☐ Measure impact on strategic business objectives
- ☐ Evaluate competitive advantage created
- ☐ Document unexpected benefits and challenges

## Refine and Iterate - What do we need to change?

- ☐ Collect feedback
- ☐ Capture and archive key insights to inform future AI deployments
- ☐ Create a backlog of enhancement opportunities
- ☐ Prioritize improvements based on business impact
- ☐ Develop a regular update schedule for AI models and systems

# Phase 5: Scaling - How much more can you do?

## Scale Successfully

- ☐ Identify and prioritize additional use cases based on proven success metrics
- ☐ Develop a comprehensive roadmap for organization-wide AI agent implementation
- ☐ Create standardized methodologies with reusable templates and components
- ☐ Establish governance frameworks to maintain consistency across deployments
- ☐ Apply key learnings from initial deployments to optimize future implementations

## Build Organizational Capability

- ☐ Establish comprehensive AI literacy programs across departments
- ☐ Implement specialized training for effective human-AI collaboration
- ☐ Develop a community of practice to share implementation successes
- ☐ Create governance structures for responsible AI expansion
- ☐ Build dedicated cross-functional AI implementation teams
- ☐ Design career advancement pathways for AI specialists

## Evaluate Vendor Relationships

- ☐ Reassess vendor partnerships based on performance
- ☐ Negotiate enterprise-level agreements for scaling
- ☐ Diversify technology providers to reduce risk
- ☐ Create feedback loops with key technology partners
- ☐ Evaluate build vs. buy decisions for specialized capabilities
- ☐ Track vendor roadmaps against organizational needs

# Phase 5: Scaling - How much more can you do?

## Future-Proof Your Implementation

- ☐ Monitor emerging AI technologies and capabilities
- ☐ Create innovation pipeline for AI experimentation
- ☐ Develop adaptable architectures that can incorporate new capabilities
- ☐ Build cross-functional teams focused on AI advancement
- ☐ Create strategic partnerships with research organizations
- ☐ Allocate resources for ongoing exploration and learning
- ☐ Develop scenarios for how AI might disrupt your industry