AI Strategy Development Workflow

1. Business Goal Identification

- • Meet with stakeholders to define high-level objectives.
- • Clarify revenue, efficiency, customer experience, or cost-saving goals.
- • Identify KPIs that will measure AI success.

2. Pain Point & Opportunity Mapping

- • Document current bottlenecks in workflows or operations.
- • Identify repetitive tasks suitable for automation.
- • Highlight areas where customers or employees struggle most.

3. Data Readiness Assessment

- • Evaluate quality, structure, and accessibility of existing data.
- • Identify gaps in data needed for AI use cases.
- • Check compliance risks and data privacy constraints.

4. AI Use Case Prioritization

- • Brainstorm potential AI solutions (automation, analytics, chatbots, etc.).
- • Assess impact vs. complexity for each idea.
- • Select 1–3 use cases for pilot phase.

5. Pilot Project Design

- • Define scope, timeline, and expected outcomes.
- • Identify datasets, tools, and human-in-the-loop steps.
- • Create a clear workflow of how AI will operate in the pilot.

6. Implementation Planning

- • Assign roles and responsibilities.
- • Build or integrate AI tools, prompts, models, or automations.
- • Set up performance tracking dashboards.

7. Testing & Validation

- • Run controlled tests with real or sample data.
- • Validate outputs for accuracy and reliability.
- • Collect user feedback and refine the system.

8. Deployment & Training

- • Roll out AI workflow into daily operations.
- • Train teams on usage, best practices, and escalation steps.
- • Ensure documentation is complete and accessible.

9. Performance Monitoring

- • Track KPIs and compare against baseline metrics.
- • Identify errors, inconsistencies, or adoption issues.
- • Retrain or adjust AI workflows as needed.

10. Review & Scale-Up

- • Present pilot outcomes to leadership.
- • Decide whether to scale, pivot, or improve the solution.
- • Roll out expanded AI workflows across departments.