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Quick Checklist for AI Adoption

10 key questions to ask before starting an AI project.

1 **Do we have a clear business problem?** ☐

Identify the process that is consuming too much time, money or employee effort.

2 **Is the process repetitive?** ☐

Look for data entry, document processing, reporting, reconciliation, approvals or repeated queries.

3 **Is AI actually the right solution?** ☐

Some problems need simple automation or software improvements rather than AI.

4 **Do we have the required data?** ☐

Check whether the relevant information exists and is accessible.

5 **Is our data reliable?** ☐

Look for missing, duplicated, inconsistent or outdated information.

6 **Have we considered data security?** ☐

Define what data the AI system can access, who can access it and how sensitive information will be protected.

7 **Can we integrate with existing systems?** ☐

Check whether the AI solution can work with your accounting software, CRM, ERP, databases or other business applications.

8 **Can we start with one small use case?** ☐

Choose one process instead of trying to transform the entire business.

9 **Can we measure the result?** ☐

Define metrics such as time saved, processing speed, error reduction or employee workload.

10 **Are employees ready for the change?** ☐

Explain what AI will automate, what employees will continue to handle and where human review is required.

The 5-Question Executive Test

If you can answer these clearly, you are ready to move forward.

1. What problem are we solving?
2. Do we have the data?
3. Can we protect it?
4. Can we test it on a small scale?
5. How will we measure success?

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