**[A blue and white sign

Description automatically generated](https://www.smartsheet.com/try-it?trp=12093&utm_source=template-word&utm_medium=content&utm_campaign=AI+Strategy+Framework+Worksheet-word-12093&lpa=AI+Strategy+Framework+Worksheet+word+12093)AI Strategy Framework Worksheet**

*Use this worksheet to guide your business as you develop a comprehensive AI strategy. In each section, consider the various critical aspects of AI implementation and what they would mean for your business.*

**DATE:**

BUSINESS GOALS

|  |  |  |
| --- | --- | --- |
| **Primary Objectives to Achieve with AI**  *Improve customer experience, reduce specific cost, etc.* | **Key Performance  Indicators**  *Satisfaction scores, increased profit margins, etc.* | **Feedback  Mechanisms** |
|  |  |  |

ROADMAP

|  |  |  |
| --- | --- | --- |
| **Short-Term Goals** | **Long-Term Goals** | **Milestones** |
|  |  |  |
|  |  |  |
|  |  |  |

USE CASE MODELING

|  |  |
| --- | --- |
| **Example Use Cases  that are Relevant to your Business**  *AI solution deployment* | **Assessment**  *Value added to that business; Potential impact and feasibility applied to your business* |
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DATA AND TECHNOLOGY STRATEGY

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| --- | --- |
| **Data Gaps** *Available data sources; Missing data sources required for AI implementation.* |  |
| **Data Governance** *Governance practices required to ensure data quality and security.* |  |
| **Technology Requirements** *AI tools (machine learning platforms, data analytics tools, etc.).* |  |
| **Infrastructure Requirements** *Upgrades or investments (cloud services, etc.).* |  |
| **Potential Vendor Partners** *If AI solutions will not be provided in-house.* |  |

TALENT

|  |  |  |
| --- | --- | --- |
| **Current Skills of Employees** | **Required Skills** | **Ideas for Upskilling** |
|  |  |  |

CHANGE MANAGEMENT

|  |  |
| --- | --- |
| **Key Stakeholders for AI Initiatives** | **Plan for Onboarding and ensuring Buy-In** |
|  |  |
| **Strategy for Managing Organizational Change** | |
|  | |

BUDGET

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Category** | **Item** | **Estimated Cost** | **Actual Cost** | **Variance** | **Notes** |
| Setup |  |  |  |  |  |
| Talent |  |  |  |  |  |
| Development |  |  |  |  |  |
| Operations |  |  |  |  |  |
| Legal |  |  |  |  |  |
| Communication |  |  |  |  |  |
| Contingency |  |  |  |  |  |
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| **Total** |  |  |  |  |  |

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| --- |
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