BELLENA CONSULTING GROUP

AI Adoption Checklist

For 10-100 person service businesses. Tick what is true today; the gaps show what to fix first.

LEADERSHIP & OWNERSHIP

- ☐ Leadership has agreed on one or two business problems AI should help with
- ☐ One named person owns AI decisions
- ☐ A small pilot budget is set aside
- ☐ We know what result would count as success

DATA

- ☐ Information for our chosen workflow lives in one system
- ☐ That information is current and reasonably accurate
- ☐ We know which client data must never go into public AI tools

PROCESS

- ☐ The workflow we want to improve is written down
- ☐ The team follows it consistently
- ☐ We know how long it takes today

PEOPLE

- ☐ A few staff already use AI in real work
- ☐ Someone will champion the pilot
- ☐ Staff get time to learn, not just a login

RISK & RULES

- ☐ We have a one-page AI usage policy
- ☐ A person reviews anything before it reaches a client
- ☐ We know which vendors store or train on our data

PILOT PLAN

- ☐ We've checked what our existing software already includes
- ☐ The pilot runs four to six weeks with no long contract
- ☐ We've set a date to review results and decide: keep, adjust or stop

Mostly ticked: pick a pilot and start. Mixed: fix data and process for one workflow first.
Few ticks: start with ownership and a usage policy - tools come later.

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