



AI Strategy Checklist

Ready to make AI work for your organisation?

Use this quick-start checklist to plan, pilot, and scale AI securely – so your team spends less time on admin and more time driving growth.

Set Up AI Governance and Compliance

Start with strong guardrails—clear policies and UK GDPR compliance ensure your AI journey is secure from day one.

- ☐ Draft and publish an AI usage policy (data, privacy, ethics)
- ☐ Assign AI oversight (committee or governance team)
- ☐ Vet all AI tools for UK GDPR and Data Protection Act compliance
- ☐ Implement security controls (Microsoft Purview, Azure AD)

Identify High-Impact Use Cases and Launch Pilots

Focus on quick wins—target simple, high-value processes to prove ROI fast and build momentum.

- ☐ Audit business processes for automation opportunities
- ☐ Prioritise projects with high ROI and low complexity
- ☐ Launch pilot projects (e.g., Copilot, HR chatbot, invoice automation)
- ☐ Define and track success metrics (time saved, error reduction)

Adopt Microsoft 365 Copilot

Empower your team with Copilot—turn everyday tasks into productivity breakthroughs.

- ☐ Enable Copilot for a cross-functional pilot group
- ☐ Provide scenario-based training and prompt examples
- ☐ Monitor productivity gains with analytics (Viva Insights, usage reports)
- ☐ Share success stories and tips internally

Deploy AI Agents in Finance, HR, and Logistics

Automate the heavy lifting—AI agents streamline core workflows so your people can focus on growth.

- ☐ Finance: Automate expense categorization, reconciliation, forecasting
- ☐ HR: Implement chatbots for FAQs, recruitment, sentiment analysis
- ☐ Logistics: Use AI for inventory management, route optimization, predictive ordering
- ☐ Ensure third-party AI tools meet data protection standards

Build Skills and Manage Change

Build an AI-ready culture—train, support, and inspire your workforce to embrace innovation confidently.

- ☐ Secure leadership buy-in and appoint AI champions
- ☐ Deliver ongoing AI training (Microsoft Learn, LinkedIn Learning)
- ☐ Promote ethical AI use and gather user feedback
- ☐ Celebrate wins and address concerns transparently

Scale, Measure, and Refine

Expand with control—scale AI securely, track impact, and refine your strategy for continuous improvement.

- ☐ Expand successful pilots to more teams and processes
- ☐ Maintain strict security and privacy controls
- ☐ Track KPIs (cost savings, productivity, compliance)
- ☐ Review and update your AI strategy annually

Your AI journey starts here

Use this checklist to take the first step today, and turn smarter strategy into real business results. **Start with governance and launch your first pilot now.**