Your manager's AI adoption checklist

Use this checklist to prepare people, set expectations, and support responsible everyday use.

Business / team: _____ Date: _____

- [ ] **Explain the purpose**
  Describe the business problem, the role of AI, and what remains with people.
- [ ] **Confirm approved tools and uses**
  Identify which tools and tasks are authorized, and who can answer questions.
- [ ] **Set clear data boundaries**
  Give practical examples of information that can be used and what needs authorization.
- [ ] **Assign ownership and oversight**
  Name the workflow owner, reviewers, and an escalation contact.
- [ ] **Practice with role-specific tasks**
  Use approved sample information and familiar work in hands-on sessions.
- [ ] **Make output review explicit**
  Check facts, figures, completeness, and suitability before the output is used.
- [ ] **Provide reusable learning support**
  Share guides, reviewed examples, and recorded walkthroughs for refreshers and onboarding.
- [ ] **Plan feedback and follow-up**
  Set a review date and track quality, workload, adoption, and recurring difficulties.

Resolve unclear approvals or data boundaries before expanding everyday use.

My team’s next action, owner, and review date

Free 30-minute consultations are opening soon. Explore our services and practical resources.

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