



IMPLEMENTING
ARTIFICIAL INTELLIGENCE [A.I]
ACROSS YOUR ORGANISATION

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ABOUT THIS GUIDE

Artificial Intelligence (AI) is no longer a futuristic concept. It's a tool that can revolutionise your business, if implemented correctly.

The key to success with AI is to stay focused on solving real business problems and delivering tangible value.

This guide will provide a straightforward path to integrating AI into your operations, focusing on practicality, cost-efficiency, and measurable outcomes.





IDENTIFY

List 2-3 key business challenges where AI could potentially improve efficiency or outcomes.

Example:

AI can optimise your marketing campaigns by personalising content and targeting the right audience, resulting in higher engagement and conversion rates.



RESEARCH

Look for established AI tools or platforms that address your identified challenges. Choose AI tools that match your business needs in terms of functionality, cost, and ease of use.

Tip:

Suggested sites to help you identify tools are: findmyaitool.com futurepedia.io
AI GPTs can also assist to find and evaluate products based on your needs.



START SMALL

Choose one area for a pilot project.

Example:

Consider testing AI tools to review zoom transcripts from discovery calls. Test Claude, GPT and Gemini to review cleaned transcripts you can then use to populate your CRM and write proposals.



METRICS

Define specific, measurable goals for the pilot. For example, increasing sales by 15% or reducing customer support costs by 20%.

Examples:

Increase conversions of prospects to clients by 30% within the next 90 days.
Decreasing admin time spent writing proposals and zoom notes by 80%.



TRIAL

Test the AI solution for 1-3 months, gathering data on performance and user feedback. Experiment with different tools and refine your approach based on results.

Template:

We've included an example of an AI Use Case template on the next page.
Use this to create your own, and in doing so trial AI across your organisation using a consistent framework.

AI USE CASE [TEMPLATE]

Project

Owner

Prediction	Decision Making	Opportunity	Business Integration	Consequences
Data				Risks
Key Performance Indicators		Opportunity Size		





ASSESSMENT

Evaluate your team's existing AI knowledge and identify gaps.

Template:

Assess your team using the template we've provided on the following page. Working through this exercise with your team is also a good way to talk through any questions they have while communicating your expectations.



TRAINING PLAN

Create a curriculum covering AI basics, specific tools, and ethical considerations.

Tip:

A helpful way to start this is to upload your assessment matrix into a LLM tool (suggest testing Gemini, Claude and Chat GPT) and ask it to suggest a training plan you can then refine.



LEARNING METHODS

Combine online courses, workshops, and hands-on practice.

Tip:

Incorporate this into your existing training processes. Include feedback, assessment updates, measurement and how you incorporate this in your onboarding of new team members.



CONTINUOUS LEARNING

Set up regular knowledge-sharing sessions and updates on AI advancements.

Example:

We have a fortnightly Adventure Hour team zoom, a dedicated AI channel in our team chat, and collaborate monthly on the AI segment of our client reports. Our learning resources are easily accessible (and updated) in our internal Google Hub.

TRAINING ASSESSMENT [TEMPLATE]

Skill Category	Skill / Competency	Proficiency Level	Self-Assessment (1-5)	Manager Assessment (1-5)	Training Required	Comments
Basic AI Knowledge	Understanding of AI concepts	Beginner				
	Understanding of Machine Learning	Beginner				
	Understanding of Machine Learning	Intermediate				
Data Handling	Data Collection	Intermediate				
	Data Cleaning	Intermediate				
	Data Analysis	Advanced				
AI Tools Proficiency	Proficiency with AI tool (e.g. Jasper)	Intermediate				
	Proficiency with Data Visualisation tools	Intermediate				
	Proficiency with automation tools	Beginner				
Technical Skills	Programming (e.g. Python)	Intermediate				
	Knowledge of databases (SQL, NoSQL)	Intermediate				
Project Management	Managing AI projects	Advanced				
	Cross-department collaboration	Intermediate				
Soft Skills	Problem Solving	Advanced				
	Critical Thinking	Advanced				
	Communication	Advanced				
Ethics and Compliance	Understanding of AI Ethics	Intermediate				
	Data privacy and Compliance	Advanced				

Note: this is a very generic assessment. Edit to fit your organisation, industry, and specific training needs.





LEADERSHIP

Create an AI Council to centralise AI oversight, enhance decision-making, promote responsible AI use, and ensure effective, ethical deployment across your organisation.

Example:

A large organisation will have representatives from each department. A smaller organisation (such as ours) includes an AI specialist, business manager, operations manager, finance manager and our casual client lead.



DEVELOP STRATEGY

Align AI initiatives with overall business goals.

Template:

On the next page is a very simple strategy framework created using a prompt. We suggest using your own prompts to refine this into a strategy that clearly aligns with your own organisation.



STANDARDISE PROCESSES

Establish company-wide protocols for AI implementation and data handling.

Tip:

As you complete your use cases, incorporate these into your standard operating procedures to ensure organisation-wide adoption.



POLICIES

Document clear policies on AI usage, data privacy, and ethics.

Tip:

We have both internal and external policies covering our usage. This is an excellent starting point when creating or improving your own:

[10 things to include in your AI policy.](#)



REVIEW & ADJUST

Schedule quarterly meetings to assess progress and realign efforts.

Tip:

Depending on the size of your organisation, these conversations have a place in:

- leadership planning days
- AI Council
- quarterly team & departmental meetings

THE STRATEGY PROCESS

DEFINE BUSINESS OBJECTIVES

1. Identify and clearly articulate your overall business goals.
2. Determine how AI can contribute to achieving these objectives.
3. Engage key stakeholders to ensure alignment and buy-in.

ASSESS CURRENT CAPABILITIES

1. Evaluate your current AI capabilities, including tools, technologies, and team expertise.
2. Identify gaps and areas for improvement.
3. Consider conducting a SWOT analysis (Strengths, Weaknesses, Opportunities, Threats).

DEVELOP AI USE CASES

1. Brainstorm potential AI applications that align with business objectives.
2. Prioritise use cases based on impact and feasibility.
3. Create a roadmap for AI implementation with clear milestones and deliverables.

IMPLEMENT AND INTEGRATE

1. Start with pilot projects to test and validate AI use cases.
2. Ensure integration with existing systems and processes.
3. Develop a cross-functional team to oversee implementation and address challenges.

MONITOR AND OPTIMISE

1. Establish metrics and KPIs to measure the success of AI initiatives.
2. Continuously monitor performance and gather feedback.
3. Iterate and optimise AI strategies based on insights and outcomes.





BUDGETING

Plan a detailed budget covering both initial and ongoing costs.



LEVERAGE

Leverage existing resource by utilising free trials, open-source tools, and current infrastructure.



NEGOTIATE

Opt for scalable, pay-as-you-go models with AI service providers.



PRIORITISE

Focus on projects with clear ROI potential.



MONITOR SPEND

Track AI expenses and identify opportunities for savings.



INTERNAL CAPABILITIES

Invest in upskilling current employees rather than solely relying on external experts.



USAGE

Regularly review AI tool utilisation and eliminate redundant or underused services.

Tip:

Clearly identify the areas where automation and data analysis can directly enhance revenue or reduce costs.



DEFINE SUCCESS

Ensure each AI initiative has specific, measurable goals tied to business outcomes.



SET KPI'S

Create a dashboard of key performance indicators for each AI project.



REGULAR REVIEWS

Schedule monthly check-ins to assess progress towards objectives.



MONITOR PERFORMANCE

Continuously track AI performance against these metrics. Use performance data to refine and improve AI initiatives.



PRIORITISE VALUE

Ensure AI projects drive tangible business value.

Example:

Table your initiatives in a master spreadsheet managed by your AI Council. Each initiative is assigned to one of your business outcomes identified as a priority for the quarter with ROI/KPIs included.

Tip:

Define clear milestones and review dates for transparency and ownership across your organisation.

Example:

Because we run on EOS we have a weekly scorecard for each team. This helps us identify any issues or trends and keep on track to achieve our quarterly rocks.

Tip:

This comes back to your ROI and KPIs. By measuring these you can make sure the resources you're assigning provide tangible value.

RESOURCES



PODCASTS

- [Artificial Intelligence Podcast](#)
- [The AI Explored Podcast](#)



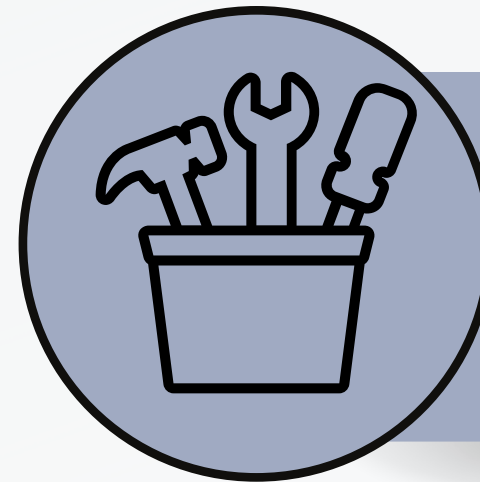
DOWNLOADS

- [AI Business Blueprints](#)
- [A Strategic Approach to AI Integration](#)



PROMPT GUIDES

- [Gemini](#)
- [Claude](#)
- [Chat GPT](#)



TOOLS WE LOVE

- [Zapier Central](#)
- [Landbot](#)
- [Restream](#)



NEXT STEP

TALK TO US

ABOUT HOW WE CAN HELP YOU LEVERAGE AI


CLICK TO BOOK

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