

Section 1: Business Problem

Define the core business challenge you want to address with AI integration.

Challenge Name	
Business Type	
Problem Statement	
Desired Outcome	

Section 2: Current Workflow Mapping

Customer Action	Business Activity	Manual Step	Decision Point	Outcome
↓	↓	↓	↓	↓

Section 3: Data Readiness

Assess the availability and quality of data needed for AI integration.

Data Source	Exists?	Trusted?	Owner	Notes
Customer Data	<input type="checkbox"/>	<input type="checkbox"/>		
Sales History	<input type="checkbox"/>	<input type="checkbox"/>		
Pricing Data	<input type="checkbox"/>	<input type="checkbox"/>		
Marketing Data	<input type="checkbox"/>	<input type="checkbox"/>		
Inventory Data	<input type="checkbox"/>	<input type="checkbox"/>		

Section 4: Future AI Workflow Sketch

Current Step	AI Support	Human Review	Customer Action	Business Outcome

Section 5: Designing an AI Adoption Plan

Target Workflow & Problem Statement	AI-Enabled Solution Concept	Data & System Requirements
Risk, Compliance & Change Considerations	Pilot Scope	Success Metrics

Section 6: Wrap-Up & Next Steps

Common Pitfalls to Avoid	How to Start Small & Scale Responsibly	How to Adapt the Framework to Other Workflows & Teams