

# AI ADOPTION CHECKLISTS

## Specialized Roadmaps for Every Leader in Your Organization

Equip your teams with role-specific, phase-based checklists that turn AI ambition into coordinated, responsible action. These frameworks help leaders align strategy, governance, skills, and delivery to accelerate value, reduce risk, and scale AI with confidence across the enterprise.

**Select the checklist that fits your role, tailor the actions to your priorities, and build a clear, executable AI adoption plan starting today.**

- ☐ ALL ROLES
- ☐ SENIOR LEADERS
- ☒ BUSINESS & ADMINISTRATION PROFESSIONALS
- ☐ PROJECT MANAGERS
- ☐ SOFTWARE DEVELOPERS AND ENGINEERS
- ☒ DATA PROFESSIONALS
- ☐ IT PROFESSIONALS






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**A successful AI transformation requires a unified approach that aligns every team and role toward a common goal.**

This Universal Phases checklist provides a structured framework for all stakeholders, guiding your organization from initial planning to full-scale implementation. Use this roadmap to coordinate efforts, assign clear ownership, and ensure a cohesive, responsible, and effective AI adoption process.

### Universal Phase Checklist for All Roles

	Phase	Key Steps	Owner(s)	Artifact/ Output
	<b>Foundations</b> (0–30d)	Define AI scope, responsible use policy, assemble project leads, and create initial use-case intake channel.	Senior Leader, IT, L&D	AI scope document, intake form
	<b>Pilots</b> (31–90d)	Prioritize use cases, conduct risk, legal, and data reviews, implement pilots, and evaluate adoption readiness.	Project Manager, HR, Security	Pilot charter, assessment
	<b>Scale</b> (90d+)	Integrate operational ownership, set SLAs and KPIs, finalize adoption and measuring plans, and optimize for cost and security.	Product Owner, IT, Finance	Runbook, KPI dashboard

### THE LEARNING TREE ADVANTAGE

For over 50 years, Learning Tree International has empowered organizations to navigate complex technological transformations. Our award-winning training solutions equip your leaders and teams with the critical AI skills needed to drive innovation, ensure responsible adoption, and achieve measurable business results. Partner with us to build a future-ready workforce and gain a decisive competitive edge.



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**As a senior leader, your role is to steer AI initiatives toward strategic business goals, manage risk, and drive enterprise-wide value.**

Use this checklist to establish a robust governance framework, align AI investments with core objectives, and ensure your organization adopts artificial intelligence responsibly and effectively. This guide provides a clear roadmap for overseeing the foundational, pilot, and scaling phases of your AI journey.

### Phase-Based Checklist for Senior Leaders

Phase	Key Steps	Owner(s)	Artifact/Output
Foundations (0–30d)	Set AI operating model (CoE, federated, hybrid). Define risk appetite; determine what to automate or not.	CEO/CTO	Operating model doc, risk statement
	Map AI strategy to business goals; baseline current metrics and cost.	Chief Strategy Officer	AI vision, KPI baseline
	Launch AI steering committee.	COO	Committee charter
Pilots (31–90d)	Approve portfolio of prioritized use cases (Top 5, owner, KPI, timeline) using Value × Feasibility × Risk scoring.	Steering Committee	Use-case portfolio document
	Decide build, buy, or partner per use case; manage procurement risks and guardrails.	CIO, Procurement	Procurement assessment, guardrail policies
	Approve workforce impact plan (job redesign, redeployment, communications plan for changes).	CLO, HR	Impact plan, communications materials
Scale (90d+)	Review ongoing value realization against “proof of value” gates; update roadmap quarterly.	Executive Team	Value dashboards, review logs

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# BUSINESS & ADMINISTRATION PROFESSIONALS

## A Roadmap for Organizational Success

**As a leader in Learning & Development, HR, or Enablement, you are central to preparing your workforce for artificial intelligence.**

Use this checklist to build a skilled, compliant, and engaged organization ready for AI integration. This guide provides a structured path for developing skills, training on policies, and driving successful adoption from the foundational stage through to full-scale implementation.

### Phase-Based Checklist for Business & Admin

Phase	Key Steps	Owner(s)	Artifact/ Output
<b>Foundations</b> (0–30d)	Create AI skills taxonomy and proficiency levels (Foundational, Practitioner, Advanced).	L&D Director	Skills matrix
	Build assessment plan (pre and post skills checks, applied projects, manager validation).	L&D, Managers	Assessment templates
	Develop cohort rollout (protected learning time, 30, 60, 90 reinforcement schedule).	Enablement	Learning schedule
<b>Pilots</b> (31–90d)	Update job descriptions, hiring profiles, and performance goals for new AI-enhanced roles.	HR	Updated job profiles
	Launch policy training: acceptable AI use, privacy, IP, prompt hygiene, verification.	L&D, Legal	Training modules, policy checklist
	Champion program mechanics: selection, incentives, and engagement tracking.	L&D, Enablement	Champion roster, incentives
<b>Scale</b> (90d+)	Track learning adoption (active users, completion, proficiency, behavior change).	L&D, HR	Dashboards, feedback loops

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# PROJECT MANAGERS

## A Roadmap for Organizational Success

**As a project manager or functional leader, you drive the structured implementation of AI initiatives.**

Use this checklist to establish clear stage gates, ensure cross-functional alignment, and manage the entire project lifecycle from intake to value realization. This framework empowers you to deliver successful AI pilots and scale them effectively across the organization.

### Phase-Based Checklist for Project Managers

Phase	Key Steps	Owner(s)	Artifact/Output
<b>Foundations</b> (0–30d)	Use standardized intake and prioritization (problem, users, data, value, constraints).	PMO	Intake forms, scoring spreadsheet
	Define proposal stage gates: Intake → Feasibility → Pilot → Security/Privacy → Production.	PM	Stage-gate checklist
<b>Pilots</b> (31–90d)	Assign owners: project, data, model, support, security. Establish RACI matrix.	PM, Lead	RACI map, owner list
	Prepare change impact assessment, rollout plan, playbook, and team readiness checks.	PM, Ops	Impact matrix, rollout checklist
	Manage vendor and dependencies (licenses, API/data access, architecture reviews).	Procurement	Vendor list, architecture document
<b>Scale</b> (90d+)	Document “Definition of Done” (evaluation, monitoring, support, and training complete).	PM, QA	“Done” checklist, launch report
	Benefits realization: post-launch value tracking, user feedback loop, and re-evaluation.	PM, Ops	Value realization report

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# SOFTWARE DEVELOPERS AND ENGINEERS

## A Roadmap for Organizational Success

**As a software developer or engineer, you are at the forefront of building the technical foundations for AI.**

Use this checklist to apply secure development lifecycles, implement robust guardrails, and ensure your AI solutions are efficient, scalable, and ready for production. This guide provides a clear, technical-focused path for shipping high-quality AI features from development through to full-scale deployment.

### Phase-Based Checklist for Software Developers and Engineers

Phase	Key Steps	Owner(s)	Artifact/Output
Foundations (0–30d)	Apply Secure SDLC for AI: threat modeling, secrets handling, and logging or redaction.	Engineering Lead	SDLC policy, threat matrix
	Set up prompt or version control, and testing harness (regression tests for prompts or outputs).	Dev Team	Repo setup, test suite
Pilots (31–90d)	Implement guardrails: input or output filtering, system prompts, permissions, and grounding.	Dev, Security	Guardrail configs, system design docs
	Model evaluation: golden datasets, automated metrics, and human review workflow.	QA, Engineering Lead	Evaluation reports, review logs
	Cost or performance optimization: set latency targets, caching or batching, and model selection.	DevOps	KPI targets, infra dashboard
Scale (90d+)	Observability: telemetry, tracing, error budgets, rollback plans, and support runbook.	DevOps	Monitoring dashboard, runbook

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# DATA PROFESSIONALS

## A Roadmap for Organizational Success

**As a data analyst, scientist, or engineer, you are the foundation of your organization's AI success.**

You ensure data is ready, models are reliable, and performance is continuously monitored. Use this checklist to master data governance, implement robust MLOps practices, and translate complex metrics into measurable business value. This guide provides a clear roadmap for driving analytical excellence from planning through production.

### Phase-Based Checklist for Data Analysts, Scientists, and Engineers

Phase	Key Steps	Owner(s)	Artifact/Output
<b>Foundations</b> (0–30d)	Data readiness: catalog, lineage, quality SLAs, access approvals.	Data Governance	Data inventory, SLAs, approval logs
	PII handling: de-identification, synthetic data, consent and retention documentation.	Data Privacy	PII policy, synthetic data samples
<b>Pilots</b> (31–90d)	MLOps practices: experiment tracking, version management, reproducibility setup.	Data Engineering	ML pipeline docs, tracking system
	Model risk practices: perspective awareness and robustness checks, documentation standards (model cards).	Data Science Lead	Perspective Awareness tests, model cards
	Business translation: map business KPI to model metric to decision thresholds.	Analytics	Translation template, project plan
<b>Scale</b> (90d+)	Monitoring: drift, data quality, re-training criteria, performance SLAs.	Data Engineering, QC	Monitoring dashboard, retrain logs

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# IT PROFESSIONALS

## A Roadmap for Organizational Success

**As an IT professional, you are essential for ensuring the security, reliability, and governance of AI systems across the enterprise.**

Use this checklist to implement robust controls, from identity and access management to incident response and vendor governance. This guide provides a clear, risk-aware framework to manage AI operations effectively through the foundational, pilot, and scaling phases.

### Phase-Based Checklist for IT Professionals

Phase	Key Steps	Owner(s)	Artifact/Output
<b>Foundations</b> (0–30d)	Identity and access: RBAC, least privilege, conditional access, break-glass.	IT Ops, Security	IAM configs, access matrix
	Data protection: DLP, encryption and KMS, tenant boundaries, audit logging.	IT Security	DLP reports, audit logs
<b>Pilots</b> (31–90d)	Security ops integration: SIEM and SOAR, alerting, incident response runbooks.	SecOps	SIEM configs, runbooks
	Vendor and SaaS governance: app onboarding, config baseline, shadow AI detection.	ITSM	Approved apps list, config docs
<b>Scale</b> (90d+)	Resilience: backup, DR, uptime SLAs, dependency mapping.	Infra and DR Lead	Backup and DR plans, SLA docs
	Usage governance: quotas, rate limits, endpoint management and reporting.	IT Admin, Finance	Usage dashboard, reporting logs

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