

Leadership alignment worksheet

Fill it in together in the session. One answer per question, agreed by the room, not a list of everyone's views.

01 What is AI for here, in one sentence?

For example: "Faster, better answers for customers, and time back for [the work we never get to]."

03 Which three jobs first, and why those?

From the job picker shortlist. Two teams at most.

05 What never goes into an AI tool here?

The top three, in plain words. The policy holds the full list.

07 What will we do with the time saved?

Decide before it is saved, team by team.

09 What will each of us use it for ourselves this month?

One real task each, briefed and checked, shown at a review.

02 Which AI platform is our main one, and which comes second?

The plan's author recommends Claude first, ChatGPT second, Gemini third (the plan, page 7). The tool we already approve for company data comes first.

04 Who owns the rollout, and how much of their week?

A named person, not a committee. About 2 to 4 hours a week (an estimate).

06 What is the most AI may do in the next 90 days?

This plan says level 1 Read and level 2 Draft only in the pilot.

08 How will we know at day 90 that it worked?

Quality, rework, turnaround, errors caught, staff confidence. Against a baseline.

10 What would make us stop a job?

For example: worse quality after a fix, or a risk we can't manage.

Agreed on [date]

Owner [name]

Next review [date]