

Your First Moves

One page. Start at the top.

None of this is red tape. Each move connects people, makes the work clear, and prevents most of what slips.

Foundation

Align people, then name owners and run the backlog.

- Bring people along on the why before you build, starting with a listening tour. ☐
- Name a business owner and a tech owner to co-own AI, each with a trained backup. ☐
- Open one front door for every AI request, and keep one visible backlog. ☐
- Score each idea before you build: impact plus manual work removed, minus risk and cost. ☐

Communication

Can people find what exists and what changed?

- Put every approved tool in one shared catalog: what it does, who owns it, how to use it. ☐
- Require a one-paragraph how-to before any tool gets shared. ☐
- Send short release notes whenever a shared tool changes. ☐
- Name one steward to keep the catalog honest, announce what moved, and celebrate the wins. ☐
- Run a yearly idea event, open to everyone, to surface real problems. ☐

Governance

Do you control how tools are built and changed?

- Version every shared tool and keep a visible change log. No silent edits. ☐
- Add a short, fast review before anything ships company-wide. ☐
- Fund the maintenance work out loud, and protect the hours it takes. ☐
- Tie each new tool to a real problem, and measure it by adoption, not launch. ☐

Data & Reliability

Can you trust, secure, and keep what the AI runs on?

- Use live data where you can; otherwise add an owner and a review date to every document. ☐
- Ask the same key questions before and after any data change, and compare the answers. ☐
- Track each tool's cost against its use, and retire what does not earn its keep. ☐
- Classify data before sharing; keep nothing confidential in a widely shared tool. ☐
- Store anything you rely on in shared storage, and check ownership when people leave. ☐
- Put a recurring quality check on the calendar for every tool, even when it seems fine. ☐
- When you automate, add analytics, tested alerts, and a written manual fallback. ☐
- Before mission-critical work moves to a rented model, write the outage plan and keep a fallback. ☐

You do not need a platform or a budget. You need a few named owners and a few kept habits.