

How To Create an AI Strategy for Your Business: Readiness Worksheet

According to a recent Salesforce poll, 9 out of 10 companies feel they're ahead of the game when it comes to AI—but only 50% have a strategy for how to use it. And with options popping up at warp speed it can be near impossible to create optimal business outcomes with AI without a solid foundation in place.

So where do you start? We created this four-step plan to help you hone in on what's important to consider when implementing AI—so you can create a solid strategy to avoid potential pitfalls (like security breaches) and reap the greatest business benefits (efficiency, growth, and more).



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have defined AI strategies

STEP 1: PICK YOUR AI OUTCOMES

What do you hope to do or achieve with AI? Write your business goals, here.

(Side note: Research shows that writing your goals can make you about 1.5 times more likely to achieve them.)

There are three general mechanisms to get you there.



Automation

A recent report from the CDC revealed that nearly 50% of the healthcare respondents polled experience burnout. Automating repetitive tasks can help prevent this and improve patient care by freeing up provider time for what matters most. Automation can also help boost efficiency, streamline business processes, and even improve patient or customer experience.



Insights

Gaining the right insights fast can assist with business growth. (It's been said that 'data is gold.') In fact, nearly 60% of leaders have said AI boosts their ability to leverage data for improved customer interactions.



Generation

Generation use cases are seemingly endless. With healthcare it could be with patient scheduling, drug development, risk preparedness, and imaging—to pinpoint just a few examples.

List the ways these AI solutions could help drive your desired business outcomes.

(This could also mean goals that can lead to larger outcomes. For example, do you wish to streamline your user interface or build a patient scheduling system? If so, you might want to leverage generation and automation.)

STEP 2: PICK YOUR DATA SOURCES

Laying a strong foundation with your data can minimize risks and allow for better outcomes.

(For example, if you don't use the right data with Generative solutions, you won't necessarily get accurate results.) You'll also want to ensure privacy and security, to stay compliant and keep your data safe.



Location: Where or how is your data stored at your company?



Who has access to your data?



Who needs to have access—for specific solutions?

(When adding 'rules,' for example, you'll want only the people who need the data to have access to it.)



When creating an AI strategy, it's important to first know where your data lives or will live—and who has access to it. It's also imperative to be aware of your organization's risks when it comes to data breaches.

What are your data risks?

STEP 3: PICK YOUR AI SOLUTION

Now that you know your desired business outcomes (large and small), and know more about your data, you can hone in on specific AI 'tools' to help create your solutions. These are typically grouped into three categories yet can also work together.



Interpretive: These solutions can help you interpret your data to be able to quickly use it (much like a human mind would). One use case could involve patient dictations, for example. AI could be used to interpret them and ensure they go to the right person or place.

What interpretive uses would your business need?



Predictive: Analytics can help create fast, targeted responses and can help in a myriad of ways (not to mention speediness).

What predictive analytics do you think could help your business?



Generative: These solutions run the gamut, but can include even 'small' items like chat boxes for user engagement.

What generative solutions does your business need?

STEP 4: PICK YOUR ARCHITECTURE

Determining your AI architecture can help you understand the time and talent you'll need to leverage or create your AI solutions.

There are three levels when it comes to AI use:



AI as Feature

There are now several 'off-the-shelf' AI tools that involve packaging AI as a feature, including popular options like Microsoft Copilot and Chat GPT.



AI as Platform

These are software solutions that allow for AI feature use (such as SaaS options like HubSpot and Salesforce).



AI as Science

This is AI at its broadest level, and would include customized solutions or ones built from scratch. AI as 'science' often involves data scientists or high-level engineering, which can also be contracted at the fractional level.

What does your business need? Do you just need help plugging in an off-the-shelf tool? And what type?
List possible feature needs here:

Which platforms might you want to leverage?

Do you need a larger structure or more tailored AI customization? List that here:



Talk to One of Our *AI Advisors*

Want to talk in more detail about the specifics of your business? We're here to help. Schedule a call today!

- Platform Advisory
- Review Data Sources
- AI Solution Comparison

Book Now