SDI ScienceDocs Inc.
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AI Adoption Planning Template

A practical planning tool for organizations preparing to adopt AI responsibly, effectively, and in alignment with business, research, commercialization, or operational goals.

Organization / Team	
Prepared By	
Date	
AI Initiative / Use Case	

Purpose of This Template

AI adoption should not begin with a tool. It should begin with a clear understanding of the business problem, the people involved, the workflow being changed, the data available, the risks that must be managed, and the metrics that will determine whether adoption is successful.

Use this template to organize an AI adoption initiative before implementation begins. It can support startups, research teams, university-linked ventures, operational teams, and growing companies that want to use AI to improve productivity, decision-making, commercialization, proposal development, customer support, workflow automation, or operational performance.

This document is designed as a planning worksheet. Complete the sections that apply to your organization, then use the summary areas to identify gaps, next steps, and questions for leadership, technical teams, users, funders, investors, or external advisors.

Planning Rating Scale

1	2	3	4	5
Not addressed	Early / unclear	Partially planned	Mostly planned	Strongly planned

1. AI Use Case Definition

Describe the AI initiative in practical terms. The goal is to avoid vague AI experimentation and define what the organization is actually trying to improve.

Planning Item	Guidance	Notes / Response
Primary problem or opportunity	What business, research, operational, or commercialization challenge will AI help address?	
Proposed AI capability	Example: document drafting, internal knowledge search, literature review, workflow automation, data analysis, forecasting, customer support, decision support, or optimization.	
Target users	Who will use the AI system or be affected by it?	

Expected value	What should improve if the initiative succeeds?	
Boundaries / exclusions	What should the AI system not do? What decisions remain human-owned?	

2. Strategic Alignment

AI adoption should directly support organizational priorities, rather than becoming a disconnected experiment.

Planning Area	Prompt	Score 1-5	Notes / Actions
Business goals	The AI use case supports a clear business, research, commercialization, or operational goal.	___	
Leadership alignment	Leadership understands why this initiative matters and how it supports strategy.	___	
Funding alignment	The initiative is aligned with current or future grant, investor, customer, or operational priorities.	___	
Scope clarity	The initiative has a defined scope and avoids trying to solve too many problems at once.	___	

3. Workflow and User Readiness

AI implementation is more likely to succeed when the current workflow is understood and the target users are prepared.

Planning Area	Prompt	Score 1-5	Notes / Actions
Workflow mapping	The current workflow has been mapped before introducing AI.	___	
User impact	The team understands how AI may change responsibilities, review steps, and decision-making.	___	
User involvement	End users have been included in planning or feedback discussions.	___	
Training needs	Training, documentation, and adoption support have been identified.	___	
Change resistance	Potential concerns or resistance have been discussed openly.	___	

4. Data and Technology Readiness

AI systems depend on the quality, accessibility, security, and relevance of the data and tools that support them.

Planning Area	Prompt	Score 1-5	Notes / Actions
Data availability	Required data, documents, or knowledge sources are available and usable.	___	
Data quality	Data quality, completeness, and consistency have been reviewed.	___	
Security	Sensitive data, IP, privacy, and access-control issues have been considered.	___	
Tool fit	The selected AI tool or system matches the intended use case.	___	
Integration	The team understands how the AI system will fit into existing tools and workflows.	___	

5. Governance, Risk, and Responsible Use

AI adoption requires clear rules for human review, accountability, security, accuracy, and responsible use.

Planning Area	Prompt	Score 1-5	Notes / Actions
Ownership	A responsible owner or team has been assigned to oversee the AI initiative.	___	
Human review	The organization has defined when human review is required.	___	
Risk controls	Accuracy, privacy, IP, bias, security, and compliance risks have been reviewed.	___	
Policy guidance	The organization has or needs an AI usage policy or responsible-use guidelines.	___	
Escalation process	There is a process for handling errors, exceptions, or concerns.	___	

6. Implementation and Pilot Design

A focused pilot can reduce risk, build confidence, and reveal whether the AI initiative should be scaled.

Planning Area	Prompt	Score 1-5	Notes / Actions
Pilot scope	The pilot has a manageable scope with clear boundaries.	___	
Pilot users	Pilot users are identified and prepared to provide feedback.	___	
Timeline	A realistic implementation timeline has been drafted.	___	
Documentation	Pilot procedures, assumptions, and outputs will be documented.	___	
Scale decision	The organization knows what evidence will support scaling, redesigning, or stopping the initiative.	___	

7. Communication and Adoption Support

Clear communication helps users understand why AI is being adopted, what will change, and how success will be measured.

Planning Area	Prompt	Score 1-5	Notes / Actions
Message clarity	The organization can clearly explain why AI is being adopted.	___	
Stakeholder plan	Stakeholders have been identified and communication needs are understood.	___	
Training plan	Users will receive practical training and documentation.	___	
Feedback loop	There is a method for collecting feedback during and after implementation.	___	
Trust building	The plan addresses user confidence, transparency, and expectations.	___	

8. AI Adoption Roadmap

Use the roadmap below to convert planning into action. Keep the plan realistic, time-bound, and connected to measurable outcomes.

Phase	Key Activities	Owner(s)	Target Date / Milestone
Phase 1: Discovery & Readiness	Confirm use case, users, workflows, data sources, risks, and success metrics.		
Phase 2: Pilot Planning	Define pilot scope, tools, review process, training needs, and governance checkpoints.		
Phase 3: Pilot Execution	Run controlled implementation, collect feedback, track adoption, and document lessons learned.		
Phase 4: Scale or Refine	Expand, redesign, pause, or narrow the initiative based on measured results.		
Phase 5: Continuous Improvement	Create review rhythm, update SOPs, refine prompts/tools, and monitor performance.		

9. Success Metrics and Adoption Tracking

Define how the organization will know whether AI adoption is producing useful value. Metrics should include both technical performance and human adoption.

Metric Category	Example Measures	Baseline	Target
Productivity	Time saved, reduced manual work, faster document or analysis cycles		
Quality	Accuracy, completeness, review burden, error reduction		
Adoption	Active users, usage frequency, training completion, user confidence		
Business / Commercialization	Customer discovery speed, proposal support, market research, investor readiness		
Operations	Cycle time, bottleneck reduction, throughput, routing/scheduling improvements		
Risk / Governance	Policy compliance, human review rate, security incidents, exception tracking		

10. Decision Summary

Use this final section to decide whether the initiative is ready to proceed, should be narrowed, needs additional preparation, or should be paused.

Decision Question	Response	Next Step
Should this AI initiative proceed now?	Yes / No / Proceed after preparation	
What are the top three gaps to address first?		
Who must approve or sponsor next steps?		
What support is needed from ScienceDocs or outside advisors?		

ScienceDocs Support

ScienceDocs helps startups, research teams, and innovation-focused organizations plan AI adoption in ways that are practical, responsible, and connected to real business or commercialization goals. Our support can include AI use-case planning, workflow review, data readiness, stakeholder communication, governance planning, pilot design, training support, and alignment with grant-funded or commercialization milestones.

Optional Follow-Up Discussion Notes

Use this space to record questions for leadership, technical teams, end users, funders, investors, or outside advisors before implementation begins.

Topic	Key Question	Notes / Owner
Strategic fit	Does this initiative support a priority worth investing in now?	
Workflow impact	What process, role, or decision pathway will change?	
Data and security	What information will the AI system use, store, or generate?	
Human oversight	Where is human review required before outputs are used?	
Next step	What must be completed before pilot launch?	

Ready to get started? Contact us HERE.