

AI Governance Checklist

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Background and How to Use This Checklist

This checklist is a strategic planning tool designed to help department leaders and organizational decision-makers assess, plan, and execute responsible and effective AI adoption. Created as a comprehensive roadmap, the checklist supports users in aligning AI initiatives with business goals, identifying opportunities, and addressing challenges across functions.

The checklist is structured to guide leaders through a thoughtful evaluation process — from defining a clear AI vision to analyzing industry trends, assessing internal capabilities, prioritizing impactful use cases, and planning budgets and timelines. It also supports building a compelling business case for AI adoption that can be shared with executive leadership.

How to Use This Document:

- Start with your AI vision to clarify how AI contributes to innovation and future growth within your team or organization.
- Explore current trends and benchmarks to stay informed on developments in the AI ecosystem.
- Assess your organization's readiness, capabilities, and gaps in AI talent, technology, and adoption stage.
- Evaluate industry-specific adoption patterns and conduct competitive analysis to understand your position in the market.
- Identify high-impact use cases and innovation opportunities by business function.
- Plan strategically by aligning AI initiatives to business goals, assessing impact, setting priorities, and allocating budgets and timelines.

This checklist is intended to be a living document — one that evolves as your AI maturity grows. Use it to guide cross-functional conversations, steer governance development, and ensure AI is implemented ethically, effectively, and in alignment with your business strategy.

I'd love to connect with you on LinkedIn to continue the conversation to learn from each other. I also regularly post leadership and professional development content that you can use to inspire and motivate your team. To connect, just use the following link:

<https://www.linkedin.com/in/ronskillens>

I. AI Vision Statement

- A. How will the organization use AI to drive innovation and growth?
- B. How does the team build a smarter, next-gen version of the business?
- C. 1-Year and 3-Year AI Outlook with User Stories by Function

II. AI Trends Report

- A. Funding
- B. Models
- C. Milestones
- D. Legislation
- E. Research
- F. Vendors

III. Company/Department Profile

- A. Business Model Snapshot
- B. Revenue Streams Overview
- C. Goals and KPIs
 - 1. Reduce Costs
 - 2. Increase Revenue
- D. Growth Challenges and Opportunities
 - 1. Create personalized experiences.
 - 2. Enhance decision making.
 - 3. Generate more/better leads.
 - 4. Grow audience
 - 5. Improve efficiency.
 - 6. Increase sales.
 - 7. Optimize pricing.
 - 8. Predict outcomes.
 - 9. Strengthen customer loyalty.
 - 10. Reduce churn.
- E. Stage of AI Transformation Overview
 - 1. Understanding
 - 2. Piloting
 - 3. Scaling
- F. AI Adoption Barriers Assessment
- G. Past and Current AI Initiatives Review
 - 1. AI Council Overview
 - 2. Initiative Overview by Function

- a) Marketing
- b) Sales
- c) Service
- 3. Summary of Experience and Value

H. AI Talent Overview

- 1. AI / ML Staff
- 2. Data Staff
- 3. Consultants and Agencies
- 4. Board and Advisors
- 5. Executive Team
- 6. Internal AI Education and Training

I. AI Technology Summary

- 1. Data Structure and Management
- 2. AI Tools
- 3. Core Tech Stack
- J. AI Code of Ethics / Responsible AI Principles

K. Generative AI Policies

IV. AI and Your Industry

A. AI Industry Adoption Snapshot

- 1. Industry Adoption Overview
- 2. High Performers Review (if applicable)
- 3. Case Studies (if applicable)

B. Competitive Analysis (1 - 3 competitors; numbers vary by engagement)

- 1. Tech
- 2. Talent
- 3. POV
- 4. Products / Services

C. Trends

D. Challenges

E. Opportunities

F. Top AI Vendors

G. Reports and Resources

V. AI Impact Assessments

- A. Company
- B. Customers
- C. Department
- D. Industry
- E. Partners / Vendors
- F. Products / Services
- G. Team
- H. Tech Stack
- I. Workflows

VI. Use Case Priorities

- A. Priorities By Function

VII. Problem-Based Priorities

- A. Priorities By Function

VIII. Innovation Opportunities

- A. Opportunities By Function

IX. Timelines

- A. By Projects

X. Budgets

- A. By Project