FOR $10M–$100M COMPANIES | FOUNDERS · CEOS · COOS · CFOS

The AI Strategy Workbook

Part 1: Turning AI ideas into a clear strategy. A step by step guide to deciding where AI should go first in your business, planning around the pitfalls that stall most projects, and rolling it out in stages so it pays back instead of sitting unused.

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Most companies don't need more AI seats.

They need AI connected to how the business actually runs: the ERP, the CRM, the helpdesk and the spreadsheets in between, aimed at work where a number moves. This workbook helps you decide what that looks like for your company, before you spend on it.

WHO THIS IS FOR

- Companies doing $10M to $100M in ecommerce, manufacturing, distribution, health or professional services.
- Leaders who bought ChatGPT, Copilot or Claude and saw little change.
- Teams running several systems that don't talk to each other, with people carrying data between them.
- Anyone the board or the CEO has asked to come back with an AI plan.

HOW TO USE IT

- **Work through it in order.** Each step builds on the last.
- **Fill in the worksheets.** Dashed lines and boxes are for your numbers and answers.
- **Bring it to any AI conversation.** Your answers become the brief.
- **Plan about 45 minutes** for a first pass. Rough numbers are fine.

WHAT YOU'LL HAVE AT THE END

STEP 1

A shortlist with a number on it

The ideas worth pursuing, the hours they touch today and what they're worth if they work.

STEP 2

A plan around the pitfalls

The checks, real test cases and partner questions that keep a first project from stalling.

STEP 3

A staged rollout

What a first version includes, how each stage earns the next and how you'll measure it.

> "What should we do with AI?" should end in a one-page plan, not another round of demos.

STEP 1

Pick what's worth building

Before anything gets built, get clear on three things: which ideas are already on the table, where your team's hours actually go, and what each idea is worth if it works.



1.1 List the ideas on the table

1.2 Map where the hours actually go

1.3 Compare AI as seats with AI as a plan

1.4 Put a number on it

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List the ideas on the table

Most companies already have a dozen AI ideas floating around. Write down what people have suggested, what it would need to do to be useful, and tick the ones worth a closer look. These become your shortlist.

AREA	THE IDEA YOU'VE HEARD	TO BE USEFUL IT SHOULD	SHORTLIST?
Customer support	"Put a chatbot on the website."	Answer from your own help content, and hand the hard cases to a person with the conversation attached.	☐
Finance and AR	"Can AI do our reconciliations?"	Match payments and remittances to invoices, flag short-pays and deductions, post only after review.	☐
Orders and fulfillment	"Where is my order?" eats the day.	Pull status from every system and draft the reply, or answer it directly.	☐
Sales	"Have AI write our follow-ups."	Draft follow-ups from call notes and CRM history, in your voice, for a rep to send.	☐
Reporting	"I want to ask the data questions."	Answer plain-English questions over live company data, read-only, with the numbers checked.	☐
Company knowledge	"Nobody can find anything."	Search policies, documents and past answers, and show the source behind every answer.	☐
Operations	"People copy data between systems."	Move records between the ERP, CRM and spreadsheets, with a log and a person approving changes.	☐
Marketing	"Use AI to make more content."	Draft on-brand content and pull performance from your ad and analytics platforms.	☐
Your own idea			☐

IN ONE SENTENCE, WHICH IDEA WOULD MAKE THE BIGGEST DIFFERENCE IF IT WORKED?

Map where the hours actually go

Estimate a normal week across the team, and count everyone who touches the work. Most teams find the total is far higher than they guessed, because the work arrives in small pieces all day.

JOB	WHO DOES IT NOW	HOURS / WEEK	AI COULD DRAFT IT?	NEEDS SIGN-OFF?
Customer emails and tickets			☐	☐
Order-status questions			☐	☐
Matching payments to invoices			☐	☐
Copying data between systems			☐	☐
Building reports			☐	☐
Chasing people for updates			☐	☐
Follow-ups, quotes and proposals			☐	☐
Finding documents and answers			☐	☐
Your own row			☐	☐

Total hours a week on repetitive work

Multiply by 50 for the year. That's the time a first AI project can start giving back.

TIP

Tick "Needs sign-off?" for anything that spends money, changes a record or speaks for the company. Those jobs can still move to AI, as drafts a person approves.

WATCH FOR

Work nobody owns. If "Who does it now" is blank, that's usually where errors and missed money hide.

AI as seats, and AI as a plan

The difference isn't the model. It's whether the AI is connected to your systems, aimed at one process where a number moves, and built with the people who will use it.

AI AS SEATS

Everyone gets a chat window

Licenses go out, an announcement goes round, and usage peaks in the first week.

Nothing is connected

It can't see the ERP, CRM or helpdesk, so people paste data in by hand.

Easy wins first

The first projects are chatbots and summaries because they're easy to build, not because they move a number.

Edge cases break trust

It handles most cases and fumbles the rest, so people stop relying on it.

No way to tell if it paid off

Nobody measured before, so nobody can say what changed.

AI AS A PLAN

One process at a time

A single, frequent piece of work where a number actually moves.

Connected to your systems

It reads the data it needs from the source, read-only first.

Built with the people who use it

The team doing the work shapes it, so it fits how they really work.

The last 10 percent goes to a person

Anything it can't handle is handed over with the context attached.

Measured before and after

You know the hours, errors or response times it changed.

WHAT IT SOUNDS LIKE, IN PRACTICE

ILLUSTRATION

How many orders shipped late last week, and why?

38 orders shipped late. 22 were waiting on one SKU that was out of stock at the warehouse, 11 were held for address checks, and 5 were wholesale orders entered after the cutoff.

Draft a note to the warehouse about the SKU and list the wholesale ones.

Done. The note is waiting for your OK, and the five wholesale orders are listed with their customers and entry times.

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Put a number on it

Time is only half the case. The other half is what slips through when nobody has time to look: errors, slow responses and deductions nobody disputed. Use last quarter as your guide.

WHERE VALUE LEAKS	HOW TO ESTIMATE IT	LAST QUARTER
Rework and errors	Orders, invoices or records fixed after the fact, times the time and cost to fix each one.	
Slow responses	Tickets, quotes or leads answered after a day or more. Estimate the share that went cold.	
Deductions and chargebacks	Short-pays, retailer deductions and chargebacks nobody disputed in time.	
Data entry between systems	Hours spent copying records, multiplied by a loaded hourly cost.	
Decisions waiting on reports	Days spent assembling numbers before a decision could be made.	

Estimated value per quarter

Add it to the hours from 1.2. Together, that's the case for your first project.

VALUE BEYOND THE NUMBERS

01

Growth without hiring at the same pace

Volume grows, and the repetitive work doesn't grow with it.

02

Faster answers

Customers, retailers and your own team get answers the same day.

03

Knowledge that stays

How the work gets done lives in a system, not in one person's head.

STEP 2

Plan around the pitfalls

Being careful about AI is the right instinct. Most AI projects don't fail on the technology. They stall on adoption, edge cases, IT sign-off or the lack of a number to measure. Plan for those before anything is built.



2.1 Check your plan against the six pitfalls

2.2 Build a realistic test from your own work

2.3 Score the results

2.4 Evaluate the partner, not the demo

Check your plan against the six pitfalls

Ask these questions of any AI plan, whoever builds it. If the answer to the first one is "we'll start with a chatbot because it's quick", stop and think again.

AREA	QUESTION TO ASK	WHAT GOOD LOOKS LIKE
Use case	Is the first project the most useful one, or just the easiest?	One piece of one process a team does every day, where a number moves.
Adoption	Who will use it, and were they involved?	The people doing the work help define it and test it before launch.
Edge cases	What happens to the cases it can't handle?	They go to a person with the context attached. It never guesses.
Systems	Is it connected to the data it needs?	Read-only access to the source systems first, not a copy-and-paste workflow.
IT and governance	Where does it run, what can it touch, and who approves?	Agreed with IT before building: access by role, data kept in your environment.
Measurement	How will you know it paid off?	A number measured before and after, with a first investment small enough to prove it.

The rule of thumb: the first project should be small enough to prove and useful enough to matter. If it's only one of those, pick again.

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Build a realistic test from your own work

A demo on clean sample data proves nothing. Before anything goes live, collect 15 to 20 real situations from the last few months, including the messy ones, and run them in read-only or draft mode first.

TYPE OF SITUATION	EXAMPLE FROM A TYPICAL COMPANY	YOUR EXAMPLE
The everyday case	A customer asks where their order is, and the order is on time.	
Conflicting data	The ERP and the warehouse show different stock for the same SKU.	
Missing information	An invoice arrives with no PO number on it.	
An exception	A wholesale customer asks for terms outside your usual policy.	
Something sensitive	A complaint mentions a health issue or a legal threat.	
Out of bounds	Someone asks it to change a price or issue a large refund.	
A vague request	"Can you sort out the thing with that order from last week?"	

Keep this list. It becomes the test set every new version has to pass before it goes live, so a change that breaks something shows up in a test run, not in front of a customer.

Score the results

Run your test situations and score each area from 1 to 5. Anything below a 4 on accuracy or safety means it isn't ready to act on its own yet, however impressive it looks.

AREA	WHAT TO CHECK	SCORE 1-5
Accuracy	Are the numbers right? Amounts, dates, order and invoice details match the source systems.	1 · 2 · 3 · 4 · 5
Completeness	Did it find everything? Every open item, every exception.	1 · 2 · 3 · 4 · 5
Judgement	Did it prioritise sensibly and ask when the request was unclear?	1 · 2 · 3 · 4 · 5
Draft quality	Would your team send its drafts with little or no editing?	1 · 2 · 3 · 4 · 5
Safety	Did it stop for approval every time it should, and stay inside its limits?	1 · 2 · 3 · 4 · 5
Traceability	Can you see what it did, which data it used and why?	1 · 2 · 3 · 4 · 5
Speed	Is it faster than doing it by hand, including the time to check its work?	1 · 2 · 3 · 4 · 5

Total score (out of 35)

28 or more with no area below 4: ready for drafts with approval. Below that: keep it read-only and fix the gaps.

Evaluate the partner, not the demo

A prototype in a week looks impressive. Then it meets permissions, messy data and approvals, and it stalls. Compare your options honestly.

OPTION	GOOD AT	WHERE IT FALLS DOWN
Seats for everyone	Fast to roll out, useful for writing and research.	Not connected to your systems, so usage fades and nothing measurable changes.
The AI add-on in a tool you already use	Easy to switch on.	Works on that tool's data only, often fails on real cases, and you can't change it.
Hiring in-house	Builds knowledge that stays.	Months to hire, then one person learning the whole business alone.
A large consultancy	Breadth and a strong deck.	Slow and costly, and the people who plan it rarely build it.
An implementation partner	Maps the strategy, builds it into your systems, measures it.	Needs a proper plan first. Rushed, it won't survive real use.

QUESTIONS TO ASK ANYONE WHO WANTS TO BUILD IT

01

Can I see one running at a real company?

Not a demo account. Ask what it does every day and what went wrong early on.

02

What do you build first, and why?

The answer should start with your process and your data, not with features.

03

How does it connect to our systems?

Read-only first, with access by role. If they ask for shared passwords, walk away.

04

Who owns it when you're done?

You should own the code, the data and the accounts it runs on.

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STEP 3

Roll it out in stages

The plan is the part that's hardest to change later, so it comes first. Then AI goes live in stages, and each stage has to work on its own before the next one starts.



3.1 Know what a first version includes

3.2 Roll it out in four stages

3.3 Write your approval rules

3.4 Measure whether it's working

Know what a first version includes

Most AI vendors stay vague about the first release, and you find out what's missing after you've paid. You should know the scope before you start. This is what a solid first version covers.

01

One use case, done properly

The single process you picked in step 1, end to end.

`"Handle order-status questions."`

02

Connected to your systems

Read-only access to the ERP, CRM or helpdesk data it needs.

`"What's the status of order 48211?"`

03

Inside the tools you already use

Your helpdesk, CRM, Slack or Teams, not a new screen to learn.

`"Draft the reply in the ticket."`

04

Approvals on anything that writes

Changes, refunds and customer messages wait for a person.

`"What needs my approval?"`

05

A test set from your own cases

The situations from 2.2, run before and after every change.

`"Run the test set."`

06

Logs, training and handover

Every action written down, your team trained, code and docs handed over.

`"Show me what it did yesterday."`

NOT IN A FIRST VERSION, ON PURPOSE

Company-wide rollouts, fully automatic actions and anything that replaces a core system. Those come once the first version has earned trust on your real data.

KEEP WHAT ALREADY WORKS

If a tool already does a job well, AI connects to it rather than rebuilding it. It takes on the work between systems, not the systems themselves.

Roll it out in four stages

Each stage is live and useful on its own, and you decide when the next one starts. If something isn't right, you've lost a week of one stage, not the whole project.

STAGE 0

Map it

The use case, data sources, approval rules and security, agreed with IT. A design you can hold the builder to, before any code.

DONE WHEN

You've signed off the design, the access list and the approval rules.

STAGE 1

Prove it

A working version on your own data, read-only. It can see what it needs and change nothing.

DONE WHEN

Its answers match your systems on every test situation from 2.2.

STAGE 2

Drafts with approval

It drafts the replies, updates and records, and a person approves each one.

DONE WHEN

Your team approves most drafts without edits, scoring 28+ on 2.3.

STAGE 3

Trusted actions

Low-risk actions inside agreed limits run on their own. Everything else still waits for a person.

DONE WHEN

A month of clean logs, and you've chosen which actions to trust.

Trust grows with evidence, never with a switch.



FIG. 1 · TYPICAL TIMING FOR ONE USE CASE. MORE SYSTEMS TAKE LONGER AT STAGE 0.

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Write your approval rules

Decide in advance what AI may do on its own, what needs a person, and what it should never touch. We've filled in a sensible starting point. Change any row to suit how you work.

ACTION	ON ITS OWN	NEEDS APPROVAL	NEVER	YOUR LIMIT OR NOTE
Answer questions, build reports	■	☐	☐	
Create tasks and reminders	■	☐	☐	
Draft a customer reply	☐	■	☐	
Update a CRM or ERP record	☐	■	☐	
Send an email for the company	☐	■	☐	
Issue a refund or credit	☐	■	☐	
Change prices or terms	☐	☐	■	
Pay invoices or move money	☐	☐	■	
Delete records	☐	☐	■	
Your own row	☐	☐	☐	

Start strict, loosen with evidence. Move an action from "needs approval" to "on its own" only after the log shows it was approved unchanged many times in a row.

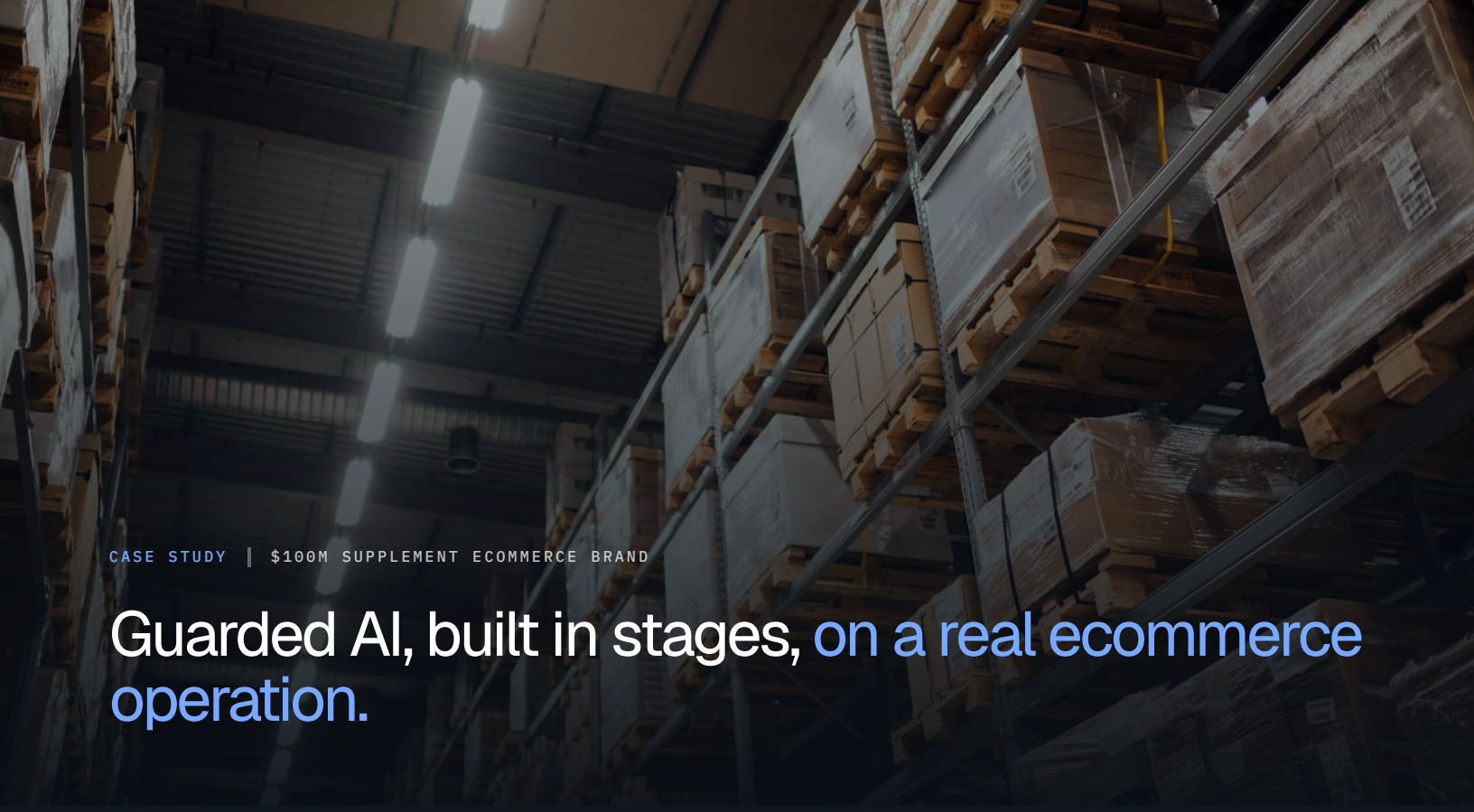
Measure whether it's working

Set checkpoints now, using your answers from step 1, so success is something you measure rather than something you feel. Write your target next to each one.

WHEN	WHAT TO MEASURE	YOUR TARGET
Week 1	Its answers match what your team would have found, on the test set and on live questions.	
Week 4	Share of drafts approved without edits. Hours a week back from the list in 1.2.	
Week 8	Errors, response times or deductions versus last quarter. Who uses it every day.	
Week 12	Value from 1.4 versus your estimate. The next use case, picked with real numbers.	

SIGNS IT'S READY FOR THE NEXT STAGE

- ✓ Your team checks its work out of habit, not because they've found mistakes.
- ✓ The action log has no surprises in it.
- ✓ People have started asking it things they used to ask a colleague.



CASE STUDY | $100M SUPPLEMENT ECOMMERCE BRAND

Guarded AI, built in stages, on a real ecommerce operation.

A $100 million supplement ecommerce brand selling direct, through retailers and on Amazon wanted AI working inside its operations, not another chat window. They had been burned before by tools that looked good in a demo.

We built it the way this workbook describes. Read and write tools kept separate, credentials encrypted, nothing with consequences without approval, and every action logged with a timestamp. Each stage went live and worked on its own before the next one started, with no rebuilds.

Every single thing the AI has done on their account is sitting in a log they can read.

90 → 10	minutes a day on chargeback alerts, with more than 91% handled automatically
98–99%	success batching around 2,000 Monday warehouse orders, live in about 3 weeks
~6 min	to post about 3,000 retailer invoices, replacing a 41-click manual process (posting tool in testing)

Book a free discovery session →

Scan or click to pick a time with a senior AI architect.

Bring your answers.
We'll turn them into a strategy.

In a free 30-minute discovery session we go through your worksheets, pick the first use case, flag the pitfalls and show you what stage 0 would look like for your company. You leave with a clear first step whether or not you work with us.

01

Your shortlist

We check your ideas, hours and value numbers from step 1 and find the biggest first win.

02

Your pitfalls

We go through the six pitfalls, your test cases and how each system would connect.

03

Your first version

A scoped first version and stage plan for your systems and your team.

BOOK A TIME

Book your free discovery session →

aisolv.io/book · or reply to the email this workbook came with.

About AiSolv. We build AI into the operations of $10M to $100M companies: ecommerce brands, manufacturers, distributors and service companies. You own what we build, it runs on your accounts, and it's designed to act safely, with approvals and a full log, from day one.