

# Strategic AI Initiative Canvas

Eight questions that must be answered before any AI initiative is funded. Covers data sourcing, human review requirements, KPI design, governance path, cost model, and ROI timeline.

Leaders & Initiative Sponsors

Used in Course 3

INITIATIVE NAME

SPONSOR / OWNER

DATE · VERSION

PRIORITY SCORE (/25)

## STEP 1 — CLASSIFY THIS INITIATIVE IN THE FOUR QUADRANTS

<p><b>Q1</b> <b>Efficiency &amp; Productivity</b> Internal · AI Assists</p> <input type="checkbox"/>	<p><b>Q2</b> <b>Intelligence &amp; Insight</b> Internal · AI Acts</p> <input type="checkbox"/>	<p><b>Q3</b> <b>Customer Value</b> External · AI Assists</p> <input type="checkbox"/>	<p><b>Q4</b> <b>Autonomous Experience</b> External · AI Acts</p> <input type="checkbox"/>
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**1 Business Problem & Strategic Link**  
What specific business problem does this solve? Which strategic priority does it support?

*e.g. "Reduces proposal turnaround from 3 days to 4 hours, supporting revenue growth target of 20% YoY"*

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**2 Data Source & Quality**  
What data does the AI need? Where does it come from? Is it clean, consistent, and accessible?

*e.g. "CRM data, product sheets, past proposals — currently in Salesforce and SharePoint. Needs consolidation."*

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**3 Human Review Design**  
Who reviews AI output? At which step? What can they approve, modify, or reject?

*e.g. "Account Manager reviews AI draft proposal — approves, edits pricing section, or escalates to VP for non-standard terms"*

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**4 Governance & Risk Path**  
What risk tier is this? What policy, controls, and escalation path apply?

*e.g. "Tier 2 — medium risk. Output reviewed before client delivery. Escalation to Legal if contract terms flagged by AI."*

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**5 KPI & Success Metrics**  
How will you know it is working? Name 2–3 specific, measurable indicators.

*Outcome KPI, process KPI, and adoption KPI*

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**6 Cost Model**  
What does this cost to build and run? Tools, integration, training, oversight time.

*One-time setup cost + monthly running cost*

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**7 ROI Timeline**  
When do you expect to see measurable value? What is the payback horizon?

*e.g. "30 days adoption, 60 days measurable time saving, 90 days ROI positive"*

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**8 Pilot Scope & Phasing**  
What is the specific, limited scope for the pilot? Which team, what volume, what timeline, and what decision point triggers phase 2?

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PILOT TEAM / SCOPE

PILOT DURATION

GO/NO-GO CRITERIA

PHASE 2 TRIGGER

INVESTMENT HYPOTHESIS — COMPLETE THIS STATEMENT

### Frame the business case in one clear statement

"We will deploy **[AI application]** to solve **[specific problem]**, which currently costs us **[time / money / quality impact]**. We will know it is working when **[measurable KPI]** improves by **[target]** within **[timeline]**. The total investment is **[cost]**, producing payback within **[months]**."

DRAFT YOUR STATEMENT HERE

DEFENSIBILITY TEST — WHAT WOULD MAKE THIS FAIL?

WORKED EXAMPLE — PROPOSAL AUTOMATION (Q3 INITIATIVE)

**Initiative: AI-Assisted Proposal Generation**    Quadrant: Q3 (External · Assists)    Risk Tier: 2    Priority Score: 21/25

<p><b>1. BUSINESS PROBLEM</b></p> <p>Proposals take 2–3 days. Win rate drops when response time exceeds 24 hours. Revenue goal: 20% growth.</p>	<p><b>2. DATA SOURCE</b></p> <p>CRM (Salesforce), product sheets (SharePoint), 50 past winning proposals. Clean and accessible.</p>	<p><b>3. HUMAN REVIEW</b></p> <p>Account Manager reviews 100% of AI drafts. Approves, edits pricing, or escalates to VP. No AI sends directly.</p>	<p><b>4. GOVERNANCE</b></p> <p>Tier 2. Brand voice guidelines applied to all AI prompts. Legal reviews any non-standard terms.</p>
<p><b>5. KPIS</b></p> <p>Proposal time: 3 days → 4 hrs. Win rate. Manager time on proposals (hrs/week).</p>	<p><b>6. COST MODEL</b></p> <p>\$2,400 setup (prompt library, training). \$150/month tool costs. 4 hrs/week review time ongoing.</p>	<p><b>7. ROI TIMELINE</b></p> <p>30 days: adoption. 60 days: measurable time saving. 90 days: ROI positive based on 1 additional deal closed.</p>	<p><b>8. PILOT SCOPE</b></p> <p>3 Account Managers, 30 days, min 10 proposals. Go if time saving confirmed and quality maintained.</p>

BEFORE APPROVING BUDGET — APPLY THIS GO / PAUSE TEST

✓ PROCEED IF ALL OF THESE ARE TRUE

- The business problem is clearly defined and connected to a measurable priority
- The data needed is available, accessible, and sufficiently clean
- A named human reviewer is assigned for every AI output that matters
- Governance and risk tier are defined before the pilot begins
- Success metrics are specific, measurable, and agreed by the sponsor
- Pilot scope is small enough to learn from without major risk

✗ PAUSE IF ANY OF THESE ARE TRUE

- The business problem is vague — "use AI to improve things" is not a problem statement
- The data required is scattered, inconsistent, or inaccessible without significant work first
- No one has clear accountability for reviewing AI output before it is acted upon
- Governance is "we'll figure it out during the pilot" — not defined before starting
- The underlying process is broken — AI will automate the problem, not solve it
- You scored 1 on Risk or Governance in the Prioritization Scorecard

NEED HELP COMPLETING THIS CANVAS FOR YOUR TOP INITIATIVES?

### AI Portfolio, Governance & Data Roadmapping Advisory

We complete the Strategic AI Initiative Canvas for your top 3 initiatives — with conservative ROI modelling, risk tiering, and phased roadmap design. Book a free consultation to start.

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