



AI Strategy Checklist

Let Thrive Help You Harness AI with Confidence

Artificial Intelligence is reshaping how organizations operate, innovate, and compete. But adopting AI successfully requires more than experimenting with tools. It demands a structured plan that aligns with business goals, security requirements, compliance standards, and long-term scalability.

Evaluate your organization's readiness, identify gaps, and build a roadmap for responsible, secure, and high-impact AI adoption.

1. Define Business Goals & Outcomes

Ensure that AI adoption starts with a clear understanding of what success looks like.

- Identify specific business challenges AI can solve
- Prioritize use cases by ROI, feasibility, and business value
- Establish clear KPIs and success metrics
- Assess whether goals require automation, prediction, optimization, or augmentation
- Confirm stakeholder alignment across IT, security, finance, and leadership.

Thrive can help you: Conduct discovery sessions to map AI capabilities to your strategic objectives and validate the highest-impact opportunities.

2. Evaluate Your Current IT & Data Readiness

AI requires strong data, infrastructure, and governance foundations.

- Audit data sources, formats, and quality
- Ensure data is permissioned, structured, and compliant
- Verify integration capabilities across existing systems
- Review cloud readiness and compute capacity
- Identify gaps in storage, networking, or application performance

Thrive can help you: Modernize and optimize your IT environment to support secure, scalable AI workloads across cloud or hybrid ecosystems.

AI delivers a

3x

efficiency boost -- turning 90-minute tasks into 30-minute ones. But most employees use it for fewer than 15 hours a week, making it a powerful sidekick, not yet a full-time partner.

Source: marketinginstitute.com/blog/generative-ai-productivity-study

3. Build a Secure & Compliant AI Framework

Security and compliance are essential, especially with evolving AI regulations.

- Classify and safeguard sensitive or regulated data
- Implement governance policies, such as ownership, usage, and retention
- Establish ethical guardrails and risk mitigation processes
- Define roles and responsibilities for AI oversight
- Ensure compliance frameworks (GDPR, HIPAA, SEC, etc.) are upheld
- Vet third-party AI platforms and models

Thrive can help you: Apply Zero Trust principles, deploy advanced security tooling, and implement responsible AI frameworks tailored to your industry.

4. Identify the Right AI Tools & Architecture

Choose tools that integrate seamlessly into your ecosystem and support your long-term roadmap.

- Evaluate build-vs-buy opportunities
- Select AI models based on use case
- Decide vendor trustworthiness, security, and data handling policies
- Plan for API integration and automation workflows
- Document a scalable architecture for model deployment

Thrive can help you: Navigate the AI vendor landscape and design a flexible architecture aligned with your business needs and budget.

5. Strengthen Security Controls for AI Usage

AI expands your threat surface; protect it from the start.

- Implement identity & access management for AI tools
- Deploy data loss prevention (DLP) controls
- Monitor AI inputs/outputs for anomalies or sensitive data leakage
- Enforce secure prompts and usage policies
- Validate AI-powered apps against your organization's cybersecurity baselines
- Integrate AI systems with SOC monitoring

Thrive can help you: Deploy comprehensive cybersecurity controls, including MDR, EDR, identity security, and governance for AI-powered environments.

According to the [2024 Real-Time Population Survey \(RPS\)](#), between **1.3%** and **5.4%** of total work hours were assisted by generative AI

6. Prepare Your Workforce

Your AI strategy succeeds only when users know how to use it responsibly.

- Develop an AI Acceptable Use Policy
- Train employees on safe prompting & data handling
- Establish processes for reviewing AI-generated output
- Provide tools for team-wide AI adoption
- Encourage innovation while defining boundaries

Thrive can help you: Deliver AI-readiness training, develop usage policies, and implement change-management programs.

7. Pilot, Measure, and Iterate

Start small, gather insights, and scale with confidence.

- Launch pilot projects with clear goals
- Collect performance data and user feedback
- Measure against ROI targets, efficiency gains, or quality improvements
- Adjust models, workflows, or data inputs
- Build a prioritized roadmap for future expansion

Thrive can help you: Manage pilot rollouts, fine-tune models, analyze outcomes, and guide your expansion strategy.

8. Implement Ongoing Monitoring & Improvement

AI requires continuous maintenance, oversight, and optimization.

- Monitor model performance and drift
- Apply patches, updates, and security fixes
- Maintain compliance documentation
- Review data quality regularly
- Assess emerging regulations and risks
- Refine your business roadmap based on evolving business needs

Thrive can help you: Provide ongoing AI governance, model monitoring, security management, and optimization services.

Your Partner for Secure, Responsible AI Adoption

Thrive helps organizations turn AI ideas into measurable business outcomes while ensuring security, compliance, and operational excellence. From strategy and architecture to security and continuous optimization, we guide your AI journey from start to finish. To learn more about AI strategy and how it can help your organization, download [Thrive's AI Readiness Playbook](#) today.

The [Gartner CFO Report](#) showed that

37%

of teams who used traditional AI reported high productivity gains, and specifically teams using GenAI saw a

34%

bump in productivity gains.



Contact the Thrive Team

To Learn More, Contact Us Today, or Give Us a Call At:

[thrivenextgen.com](https://www.thrivenextgen.com) | info@thrivenextgen.com | 1-866-205-2810

About Thrive

Thrive is a NextGen 3.0 global technology outsourcing provider that empowers small and mid-market organizations to transform their technology into a strategic advantage. Offering a breadth of services from AI and cybersecurity to cloud, compliance, and traditional MSP/MSSP solutions, Thrive's team of seasoned experts develop strategies that standardize, scale, and automate technology to achieve outsized ROI. From advisory services to a 24x7x365 SOC and NOC, Thrive provides end-to-end IT and cybersecurity management so clients can focus on innovation and growth. With Thrive, your business is always supported and always secure. Learn more at www.thrivenextgen.com or follow us on [LinkedIn](#).