CLEAR GATE SYSTEMS

Your One Page AI Strategy Note

A template for writing down why your business is using AI

From Clear Gate Systems. Free to use and adapt inside your own business.

A clear, written reason for using AI is what keeps AI work moving. Research from the RAND Corporation found that the most common root cause of failed AI projects is a problem that was never clearly defined at the start.[1] Without one, a tool gets bought, a few people try it, and six months later it is hard to say whether it worked, because what working looks like was never agreed.

This page takes about twenty minutes. Every AI decision you make afterwards gets easier, because you will have written down what you are trying to achieve.

How to use it. Sit down with whoever signs off the spending and one or two people who know the day to day work. Fill in the seven boxes in one sitting. Come back to it in three months and see whether it still reads true.

1. The business problem we are solving

Write the actual problem, with a number in it if you have one. Something a person in your business would recognise.

> *Example:* We lose about thirty hours a week across three people to manually keying invoices. We want that time back on client work.

Our answer:

If you cannot fill this in with something specific, stop here. That is the finding, and it is a useful one. A vague reason for using AI produces a vague result.

2. The first thing we will actually try

One tool, on one task, for a set number of weeks. This is the box that gives somebody a job to do next Monday.

> *Example:* We will trial an invoice scanning tool on one supplier's invoices for four weeks, with Maria running it and keeping a note of what it gets wrong.

Our answer:

Who is running it: _____ **For how long:** _____

3. What we want out of it

AI pays back in four ways. Tick the one that matters most to you.

- ☐ **Lower cost.** We spend less time or less money on something we already do.
- ☐ **More revenue.** We win more work, or serve more clients with the same people.
- ☐ **Less risk.** We make fewer errors, or we catch them earlier.
- ☐ **A stronger position.** We can offer something our competitors cannot.

4. How we will know it worked

The number, the hours, or the specific thing you will look at when the trial ends. Pick something you can actually check.

Our answer:

We will check it on: _____

5. When we expect to see it

Two very different things can sit under the word AI, and holding both in one note blurs the timeframe. Say which this is.

- ☐ **A quick win.** One process, better. These tend to show a result sooner.

- [ ] **A longer strategic move.** Something that changes how we compete. These take longer to pay back.

We expect the first measurable result by: _____

6. What we are willing to put in, and what is off limits

Five short answers. They save a great deal of argument later.

Budget range we would sign off for a first piece of work: _____

Our appetite for risk: cautious, we want a proven approach / open, we are willing to try something and learn from it

Leadership time available to actually sponsor this: _____ hours a month

Guardrails already in place: for example, our AI acceptable use policy, no client personal data in any public tool, no AI involvement in hiring decisions.

Anything else we will not do with AI:

> *One thing to know before you set the budget.* If your first use case touches hiring, promotion, credit, insurance, access to a service, or biometric data such as face or voice recognition, it sits in a category the EU AI Act treats more carefully. That is entirely workable, and it means allowing a little more time and budget for the checks. Far easier to allow for it now, while the plan is still a page.

7. Who owns this

One named person at director or managing director level who is accountable for the outcome. Their job is to answer for whether the business got what it set out to get, and to keep this note alive.

Named owner: _____

We will review this note on: _____

The test

Read the finished page aloud to somebody who was not in the room. If they can tell you back why your business is doing this and what a good result looks like, the note works. If they cannot, the thinking is not finished yet, and the page is telling you exactly where.

Keep the finished page where people will see it. When somebody proposes a new AI tool in four months, you have something to hold it up against, and the question becomes whether it serves what is written here. That is usually a short conversation.

This note is step 3 of five. If you want to see where it sits in the whole sequence, that is what the one page road, What Good AI Adoption Looks Like, sets out.

If you want a second pair of eyes on your finished note, I offer a free thirty minute call. No obligation, and you will leave with one clear priority whether or not we ever work together.

Eileen Weadick, Clear Gate Systems
Clear Gate Systems helps Irish SMEs build AI capability safely, with AI governance and EU AI Act compliance built in automatically.
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This document is for information only and does not constitute legal advice.

Sources

[1] Ryseff, J., De Bruhl, B. F. and Newberry, S. J. (2024). The Root Causes of Failure for Artificial Intelligence Projects and How They Can Succeed. RAND Corporation. https://www.rand.org/pubs/research_reports/RRA2680-1.html