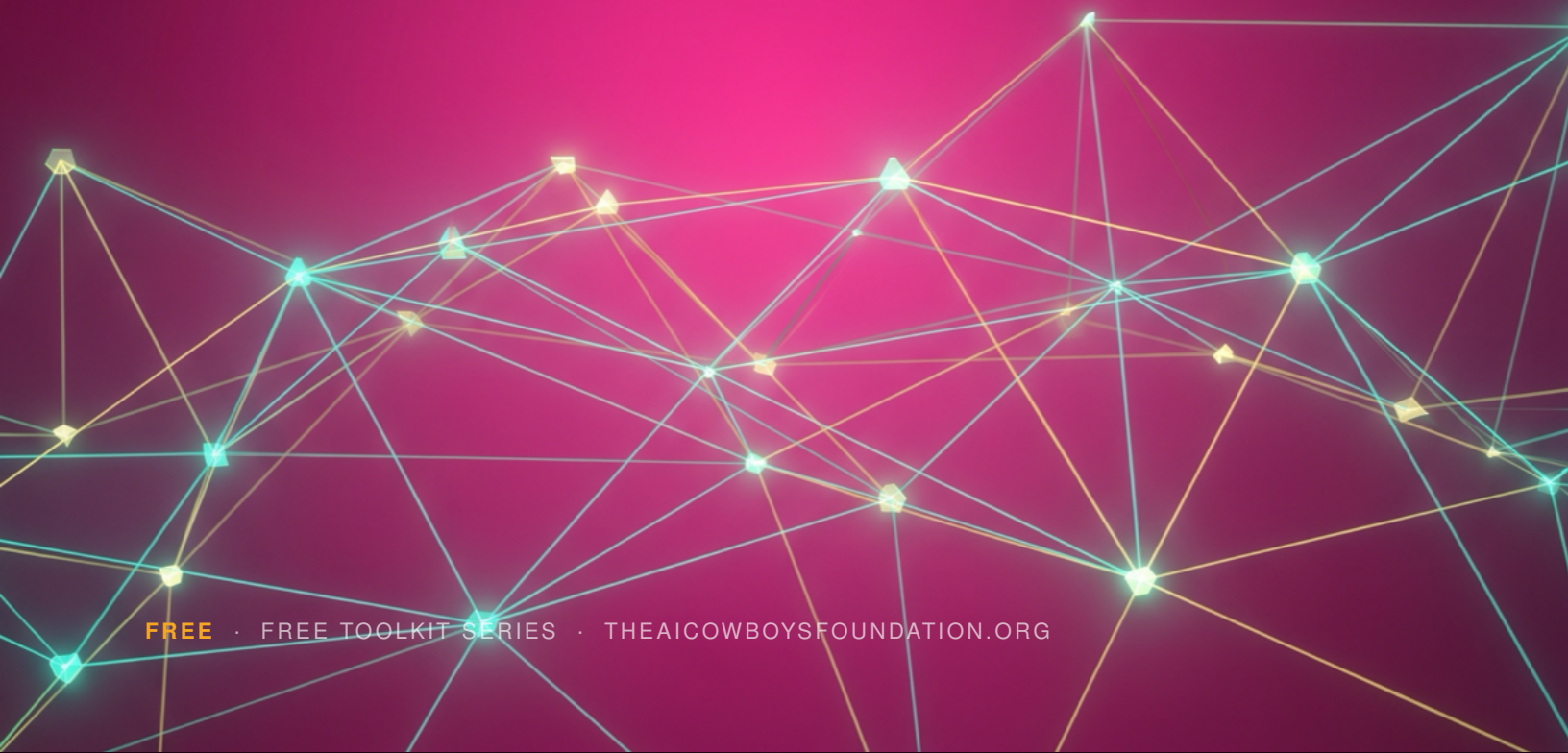
THE AI COWBOYS FOUNDATION

TOOLKIT 05 · ADOPTION

AI Adoption Roadmap Worksheet

From one good use case to a working pilot with honest results, then to the next one.



AI Adoption Roadmap Worksheet



Real adoption happens one proven use case at a time, not in one big bet.

A step by step worksheet that moves you from one good idea to a working pilot with clear results, then to your next use case. Fill it in as a team. Keep it to one page per use case.

Why small pilots beat big rollouts

The organizations that get real value from AI almost never start with a sweeping transformation program. They start with one use case, measure it honestly, and expand from proof. The data backs this up: Stanford University's 2025 AI Index found that most organizations reporting cost savings from AI put those savings under 10 percent per function, and the most common revenue lift is under 5 percent. Value compounds across many small wins, not one big bet.

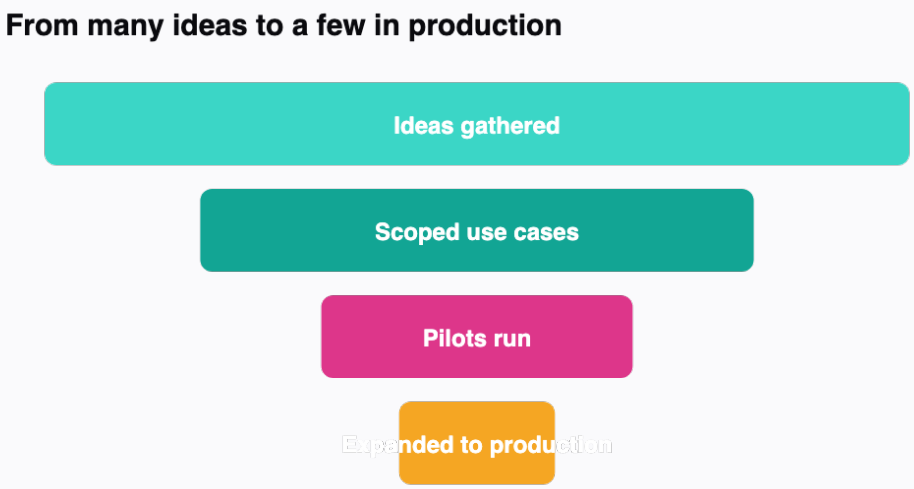
WHAT THE ADOPTION NUMBERS REALLY SAY

In 2024, 78 percent of organizations reported using AI, up from 55 percent the year before, and generative AI use in business functions more than doubled, according to the 2025 AI Index. But the same research shows typical gains per use case are modest.

The lesson: adoption is normal now, transformation is earned. The teams that win run disciplined pilots, keep what works, and stop what does not. This worksheet is that discipline, written down.

1	90	1
use case at a time is how real adoption happens	days is enough to prove or kill a first pilot	number to track per use case, not a dashboard

Most ideas should never reach production, and that is a feature, not a failure. A healthy adoption process starts with many ideas and narrows to the few that earn their place.



Start wide, ship narrow. Gather many ideas, scope the promising ones, pilot fewer, and move only the proven few into everyday use.

Step 1: Pick one high value, low risk use case

Start where the work is repetitive, the stakes are low, and time savings are real. Drafting, summarizing, and organizing information are good first choices.

- Use case: _____
- Who does this work today: _____
- Time it takes now, per week: _____
- Why it is low risk: _____

Step 2: Define success before you start

- What does good look like: _____
- The one number we will track: _____
- Starting value of that number: _____
- Target after the pilot: _____

Step 3: Set the guardrails

- Approved tool for this pilot: _____
- Data that must never be entered: _____
- Who reviews the output before it is used: _____

Step 4: Run a small pilot

- People in the pilot: _____
- Start date: _____ Check in date: _____
- How we will gather feedback: _____

Step 5: Measure and decide

- Ending value of our number: _____
- Time saved per week: _____
- What worked: _____
- What to fix: _____
- Decision: expand, adjust, or stop: _____

Step 6: Plan the next use case

Once one use case works and your team trusts it, pick the next one and repeat. Momentum comes from small wins that stack up.

- Next use case: _____
- Why now: _____

A worked example: one pilot, start to finish

WORKED EXAMPLE: A CUSTOMER REPLY ASSISTANT

Step 1, use case: draft first replies to common customer questions. Done today by two staff, about 6 hours a week.

Step 2, success measure: hours spent per week on first replies. Starting value: 6 hours. Target: under 3.

Step 3, guardrails: approved enterprise assistant only. No customer names or order numbers pasted in. A person edits and sends every reply.

Step 4, pilot: two staff, two weeks, feedback gathered in a shared doc.

Step 5, result: 2.5 hours per week, quality held, staff happier. **Decision: expand** to a third teammate and the returns inbox.

Step 6, next: apply the same pattern to internal FAQ drafting.

Common pitfalls, and how this worksheet prevents them

Pitfall	How the worksheet prevents it
Buying tools before defining the problem	Step 1 forces a named use case with a named owner
Declaring victory with no baseline	Step 2 records the starting number before the pilot begins
Sensitive data pasted into the wrong tool	Step 3 sets data rules before anyone starts
Pilots that never end	Step 5 forces an expand, adjust, or stop decision on a date

Sources and further reading

- 2025 AI Index Report, Economy chapter, Stanford Institute for Human Centered AI
- NIST AI Risk Management Framework, National Institute of Standards and Technology
- AI and Innovation at Texas DIR, Texas Department of Information Resources

PUT THIS TO WORK

Want help applying this in your organization?

The AI Cowboys Foundation delivers free briefings, workshops, and readiness assessments for business, government, classrooms, and veteran programs. Tell us what you are working on and we will point you to the right next step.

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