

AI Adoption Checklist

for Mid-Market B2B



Step 1 - Align on Vision and Objectives

- ☒ Has leadership agreed on why we are adopting AI (growth + creative acceleration, not just cost savings)?
 - ☒ Are objectives tied to real business outcomes (e.g. lead conversion, campaign speed, brand relevance)?
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Step 2 - Assess Opportunities for Quick Wins

- ☒ Have we mapped our marketing and sales processes to spot data-heavy, repetitive, or bottleneck tasks?
 - ☒ Did we shortlist 1–2 use cases with measurable ROI potential (e.g. personalization, content creation, lead scoring)?
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Step 3 - Start Small with Pilot Projects

- ☒ Did we define clear success metrics (e.g. “reduce campaign launch time by 30%”)?
 - ☒ Are we treating pilots as experiments with room to iterate, not all-or-nothing rollouts?
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Step 4 - Bring the Right Partners and Tools

- ☒ Have we evaluated tools/vendors for usability and EU-compliant data security?
 - ☒ Do we have access to specialist support (internal champion, consultant, or agency partner)?
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Step 6 - Monitor, Measure, and Iterate

- ☒ Do we have baseline metrics to compare against (cost, time, engagement)?
 - ☒ Are we capturing both quantitative outcomes (clicks, conversions) and qualitative feedback (team ease, customer response)?
 - ☒ Is there a 30-60-90 day review process in place?
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Step 7 - Scale What Works

- ☒ Have we documented lessons from successful pilots into a repeatable playbook?
 - ☒ Is there a governance model (who approves, who trains, how compliance is handled)?
 - ☒ Do we have a roadmap to extend AI into more teams, regions, or campaigns?
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Ready to turn your checklist into action?

Book your Outside-In Review to pinpoint where AI + creativity can deliver the fastest wins.

Book your Outside-In Review

