



# AI Charter Quick Start Assessment

Complete this form to establish your AI governance framework

Company: \_\_\_\_\_ Industry \_\_\_\_\_ CEO: \_\_\_\_\_ Date: \_\_\_\_\_

## AI Vision & Strategic Goals

Primary AI Objectives (Check all that apply):

- Reduce operational costs by \_\_\_\_\_ %
- Improve processing speed by \_\_\_\_\_ %
- Enhance customer satisfaction \_\_\_\_\_ %
- Enable data-driven decisions \_\_\_\_\_ %
- Increase revenue by \_\_\_\_\_ %
- Achieve competitive advantage \_\_\_\_\_ %

AI Vision Statement (How will AI transform your business?):

## Current State Assessment

AI Readiness Level:

- No AI currently - Starting fresh
- Limited AI experiments underway
- Some AI tools in production
- Multiple AI implementations active

Current Pain Points (Check top 3):

- Manual data entry
- Compliance tracking
- Data silos
- Slow document processing
- Customer response time
- Forecasting accuracy

## Pilot Use Case Selection

Select ONE high-impact area to start

- Document Processing**  
Contracts, invoices, forms
- Customer Support**  
Chatbots, ticket routing
- Sales & Marketing**  
Lead scoring, forecasting
- Operations**  
Workflow automation
- Finance & Compliance**  
Risk assessment, reporting

Expected volume:

### **AI Governance Team**

Executive Sponsor (C-Level):

AI Champion/Project Owner:

Legal/Compliance Lead:

IT/Data Lead.

Business Unit Representative:

**Meeting Frequency:**

### **Resources & Investment**

Year 1 Budget Range:

<\$50K	\$50-100K
\$100-250K	\$250-500K
\$500K-1M	\$1M+

AI Champion Time Allocation:

% FTE dedicated to AI

External Support Needed:

- AI consulting
- Technical implementation.
- Change management

### **Timeline & Milestones**

Charter Approval:



Pilot Launch:



Pilot Review:



Full Rollout:



### **Success Metrics**

Define target KPIs:

Cost reduction:	%
Cost reduction:	%
Cost reduction:	%
Cost reduction:	%
Payback period:	

### **Risk Priorities**

**Rank concerns (1-8):**

- Data security/privacy
- Regulatory compliance
- Employee resistance
- Vendor lock-in
- ROI uncertainty
- Technical complexity
- Ethical concerns
- Integration issues

### **CEO Commitments**

I commit to:

- Schedule governance team kickoff within 2 weeks
- Allocate approved budget for pilot
- Assign AI Champion with dedicated time
- Communicate AI vision to all staff

- Review progress monthly
- Champion ethical AI practices
- Include AI in board updates

## Compliance & Ethics Framework

### Regulatory Requirements:

- GDPR (EU customers)
- CCPA (California)
- HIPAA (Healthcare)
- SOX (Public company)
- Industry-specific

### Ethical Principles (Check all):

- Transparency in AI use
- Bias prevention
- Human oversight
- Data minimization
- Right to explanation

## Change Management & Training

### Training Requirements:

- AI literacy for all staff
- Ethics & responsible use
- Tool-specific training
- Data security protocols

### Communication Strategy:

- Town hall announcement
- Department briefings
- Regular progress updates
- Success story sharing

### CEO Approval


Signature \_\_\_\_\_ Date: \_\_\_\_\_

### CFO Approval (Budget)

Signature \_\_\_\_\_ Date: \_\_\_\_\_

### Legal Counsel Review

Signature \_\_\_\_\_ Date: \_\_\_\_\_



Once completed, submit to your AI Champion to develop the comprehensive AI Charter document.