8 Questions to Ask Before Moving Forward with AI

A Strategic Discussion Guide for Leadership Teams

Purpose: Most executives feel uncertain about which AI investments will actually deliver results. This guide helps you surface the critical questions that separate successful AI initiatives from expensive failures—before you invest a dollar.

After working with dozens of companies across industries, we know the patterns. These 8 questions reveal whether you're ready to move forward or need to strengthen your foundation first.

What to Expect: If you're uncertain about some, that's normal—these questions are designed to surface what you need to figure out before investing.

How to Use This Guide

- Schedule a 30-45 minute discussion with your leadership or cross-functional team.
- Review each question and capture key thoughts or differences in perspective.
- Identify 1-2 actions or next steps that emerge from the discussion.

Note: It's normal to discover disagreement or gaps. That's progress—you're surfacing real barriers before they become expensive problems.

Why These Questions Matter

Only 1 in 5 AI initiatives show up in financials. The difference isn't better technology—it's strategic clarity on the right questions before you invest.

If you can't answer 3+ of these questions with confidence, you're likely to waste resources on initiatives that don't scale.

Organizations with clear answers move faster, waste less, and see AI show up in their financials within quarters—not years.

1. Business Focus

Question: What's the business challenge you're most focused on right now—the one that would make the biggest difference if you solved it?
Purpose: Start by identifying your highest-priority business challenge. AI's greatest value often comes from addressing strategic problems—not just automating tasks. Use this question to ensure your AI efforts align with what actually matters to your business.

2. AI Relevance

Question: Looking at your biggest challenge, what would change if you could make better decisions, better predictions, faster insights, or could spot patterns in your data?
Purpose: AI excels at making predictions, processing complexity at scale, and finding patterns humans miss. This question helps you identify where AI could create strategic advantage—beyond chatbots and productivity tools.

3. Value Definition

Question: How will we know if an AI initiative is successful: time saved, revenue growth, better forecasts, lower turnover, or something else?
Purpose: Define success before jumping into solutions or pilots.

4. Risk Assessment

Question: Where might AI introduce risk to our business, and what is our plan to address that early through training, communication, or policy?
Purpose: Identify potential business risks before they become problems.

5. Resistance Planning

Question: Where are we most likely to face internal resistance, and how will we address it?
Purpose: Surface friction points before they derail progress.

6. Ownership

Question: Who should own the AI initiative day-to-day, and how do we ensure it remains tied to business goals instead of becoming an IT side project?
Purpose: Clarify accountability and sustain business alignment.

7. Data and Enablement

Question: Do we have the data, processes, and people in place to support this, or do we need to strengthen one or more of those first?
Purpose: Surface capability gaps that may limit early progress.

8. Pilot Approach

Question: If we were to run a 45-day pilot, what outcome would we want to prove before scaling?
Purpose: Encourage quick wins and tangible proof of value.

Next Steps

If you have clear answers to all eight questions:

- Document your approach and assign an owner to lead a 45-day pilot

If you're uncertain about 3 or more questions:

- This is the pattern we see before AI initiatives stall or fail—but it's fixable.
- After working with dozens of companies across industries like manufacturing, logistics, and financial services, we know the patterns of what works and what wastes money.

We help executives:

- Cut through confusion with proven strategic frameworks
- Avoid the expensive surprises that derail other initiatives
- Implement AI that shows up in financials—not just activity reports

From guessing to leading.

Ready to get answers?

Schedule a Clarity Call at www.rootidea.ai or contact us at info@rootidea.ai

Root Idea LLC

Root Idea helps executives cut through uncertainty and implement AI that wins, without ugly surprises.

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