



Start an AI project the right way

A structured, practical test for SMEs, skilled trades and technical service providers — for a focused, accountable start rather than a quick tool purchase.

Many AI projects start too quickly with a tool. A cleanly scoped start works better: **a concrete use case, a clear data foundation, defined responsibility and a realistic pilot.** This checklist helps you make a first assessment.

Management
Office & Sales
Project & Service Leads
Subject-Matter Owners

1 Trigger and Goal

- ☐ Which concrete problem should AI solve?
- ☐ Phone calls, customer enquiries, quotes, knowledge search, documentation or handovers?
- ☐ Is there a noticeable bottleneck in day-to-day operations?
- ☐ Is it clear which area should be relieved first?
- ☐ How will we know whether the pilot is useful?

Guiding question: Real operational value, or just another tool?

4 Processes and Handovers

- ☐ How does the process work today?
- ☐ Who receives the information?
- ☐ Who reviews, decides and approves?
- ☐ Where should AI results be handed over?
- ☐ A task, e-mail, enquiry card, summary or CRM note?

Important: AI must not become an island beside the business — the handover has to fit the existing workflow.

7 Pilot and Success Criteria

- ☐ The pilot has a clearly defined scope.
- ☐ The start and end points of the process are defined.
- ☐ There are test cases from real day-to-day operations.
- ☐ Results are reviewed and improved.
- ☐ Success is made easy to measure.

Possible criteria: more complete enquiries, better call-back notes, less time spent searching, faster assessment, traceable handovers.

2 A Suitable Use Case

- ☐ The process occurs regularly.
- ☐ The task can be broken down into recurring steps.
- ☐ AI assists with intake, search, structuring, summarising or preparation.
- ☐ Expert decisions stay with people.
- ☐ The first pilot is limited and not business-critical without oversight.

Suitable starting points: AI telephony, a digital customer interface, an AI employee for quotes, a company knowledge base, service and project handovers.

5 Roles and Responsibility

- ☐ Management sets the priority and goal.
- ☐ A subject-matter owner is named.
- ☐ Office, sales, service, project management or technical staff are involved.
- ☐ Data protection and IT are considered early.
- ☐ It is clear who reviews and approves AI results.
- ☐ Employees know what the AI may be used for.

Principle: AI prepares. The business decides.

Avoid Common Mistakes

- ✗ buying a tool before the use case is clear
- ✗ connecting all data without review
- ✗ checking data protection too late
- ✗ leaving departments out
- ✗ letting the AI make binding decisions
- ✗ starting too many processes at once
- ✗ defining no approvals or escalation paths
- ✗ not planning for operations after the pilot

3 Data and Information

- ☐ Which data sources are needed?
- ☐ Are documents, templates, e-mails, service reports or project files available?
- ☐ Can current and outdated content be told apart?
- ☐ Which information must not be processed?
- ☐ Who can review the content for accuracy?

Typical sources: quotes, customer enquiries, maintenance reports, checklists, technical documentation, CRM, ERP, file storage, e-mail.

6 Data Protection and Security

- ☐ Is personal data being processed?
- ☐ Is there confidential customer, contract or project data?
- ☐ Are storage location, provider, data-processing agreement and deletion logic clarified?
- ☐ Are roles and permissions defined?
- ☐ Clear rules on which content does not belong in the AI?

Guiding question: Which data does the AI really need for this use case?

Quick Assessment

- **Many ticks** — good conditions for a structured AI pilot.
- **Some ticks** — feasible, but scope the use case, data and responsibility carefully.
- **Few ticks** — first clarify processes, data sources, responsibilities and data protection.

NEXT STEP

KrambergAI works with you to identify which AI use case is **sensible, feasible and responsible** for your business.

KrambergAI AI Starter Check