# PHASED DELIVERY WORKSHEET

## for Generative AI Projects

## PROJECT OVERVIEW:

The project overview section of the worksheet is designed to provide a high-level summary of your generative AI project. It serves as a quick reference point for stakeholders to understand the project's purpose, objectives, timeline, and team structure.

### Project Name and Description

Concise name for your project.

Write a brief description summarizing the project's scope and main objectives

### Key Objectives and Goals

List the specific, measurable outcomes you aim to achieve with this project.

Focus on objectives that align with your organization's overall business strategy.

### Timeline and Milestones

Outline the expected start and end dates for the project.

Identify major milestones or checkpoints along the project timeline.

### Team Members & Roles

List the core team members involved in the project.

Specify each member's role and main responsibilities within the project.

Before you begin filling out the project overview section, take a moment to reflect on the core essence of your generative AI project. This section serves as a high-level summary that will guide the rest of your planning and execution process. Be sure to capture the most critical information about your project, including its name, main objectives, timeline, and the key players involved.

Keep your descriptions concise yet informative, focusing on the essential elements that will help stakeholders quickly grasp the project's purpose and scope.

| | |
|---|---|
| Project Name & Description | |
| Key Objectives & Goals | |
| Timeline & Milestones | |
| Team Members & Roles | |

# PLANNING PHASE

The planning phase is crucial for laying a solid foundation for your generative AI project. This section of the worksheet will help you assess your organization's readiness, align your AI initiatives with business objectives, create a detailed roadmap, and allocate resources effectively.

Start by evaluating your current technical infrastructure, data availability, and team skills to identify any gaps or necessary improvements. Next, clearly define the specific use cases and success metrics that will guide your project and ensure it delivers value to your organization.

Break the project down into manageable phases, each with its own objectives, timelines, and resource requirements. Finally, assign clear ownership and responsibilities to your team members to ensure smooth execution and accountability.

**Assess your organization's readiness for implementing generative AI:**

| Evaluate your current technical infrastructure and identify any necessary upgrades or changes | Ensure you have access to high-quality, relevant data needed to train your AI models | Take stock of your team's skills and expertise, identifying any gaps that need to be filled |
|---|---|---|
| | | |

- Identify technical gaps early to avoid costly delays and ensure your infrastructure can support the demands of generative AI.
- Ensure data quality and relevance to build accurate, reliable AI models that drive meaningful insights and value.
- Uncover skill gaps within your team to inform targeted training, hiring, or partnering decisions that fill critical roles.
- Proactively address readiness gaps to minimize risks, optimize resource allocation, and set your generative AI project up for success.

# PLANNING PHASE

When aligning your AI initiatives with overarching business goals and defining success metrics, it's essential to start with a manageable number of key performance indicators (KPIs). This allows you to focus on the most critical aspects of your project and avoid overwhelming your team with too many metrics.

For an organization just starting out with generative AI, it's recommended to begin with 3-5 core KPIs. This number provides a balance between capturing the most important measures of success and maintaining clarity and focus.

When selecting your initial KPIs, consider the following:

- **Business Impact:** Choose KPIs that directly tie to your organization's strategic objectives and demonstrate the value generated by your AI project (e.g., revenue growth, cost reduction, or customer satisfaction).

- **Operational Efficiency:** Include KPIs that measure how well your AI solution streamlines processes, improves productivity, or reduces errors (e.g., time saved, tasks automated, or accuracy rates).

- **User Adoption:** Select KPIs that track how effectively your AI solution is being adopted and utilized by end-users (e.g., user engagement, feature usage, or satisfaction scores).

As your generative AI project matures and evolves, you can gradually expand your set of KPIs to capture more nuanced aspects of performance and success. However, starting with a core set of 3-5 KPIs helps maintain focus and ensures your team is aligned on the most critical priorities.

**Align your AI initiatives with overarching business goals**

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|---|---|
| **Identify specific use cases and applications where generative AI can drive value for your organization.** | |
| | **Define clear success metrics and KPIs to measure the impact and ROI of your AI project.** |
| **KPI 1** | |
| **KPI 2** | |
| **KPI 3** | |

# PLANNING PHASE

**Align your AI initiatives with overarching business goals**

Breaking down your generative AI project into manageable phases is essential for ensuring a structured and organized approach to implementation. By defining specific objectives and deliverables for each phase, you create clear milestones that help track progress, identify potential roadblocks, and keep your team aligned and accountable.

This phased approach allows you to prioritize tasks, allocate resources effectively, and make data-driven decisions at each stage of the project. It also enables you to celebrate successes along the way and maintain stakeholder engagement by demonstrating tangible progress and value.

Use the space below to outline the key phases of your project, along with their corresponding objectives and deliverables:

| Key Phase | Objective | Deliverable |
|---|---|---|
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**Allocate resources effectively**

Setting realistic timelines and milestones for each phase of your generative AI project is crucial for effective planning and execution. By carefully considering the dependencies between tasks and the constraints on your resources (such as time, budget, and team capacity), you can create a feasible schedule that minimizes the risk of delays or overruns.

When establishing timelines and milestones, it's important to engage your team members and stakeholders to ensure buy-in and alignment. Be sure to build in some flexibility to accommodate unexpected challenges or changes in priorities.

To help visualize your project roadmap and track progress, consider using a Gantt chart. A Gantt chart is a horizontal bar chart that illustrates the start and end dates of each phase, as well as the dependencies between them. It provides a clear, at-a-glance view of your project timeline and helps keep everyone on the same page.

Using a Gantt chart template, plot out the key phases of your project, their estimated durations, and any overlaps or dependencies. Be sure to mark important milestones, such as the completion of critical deliverables or key decision points. Regularly update your Gantt chart as the project progresses to monitor performance and make any necessary adjustments to keep your generative AI initiative on track.

Here's an example of the items you might include in a Gantt chart for your generative AI project:

- Project Kickoff
- Data Preparation
- Model Development
- Infrastructure Setup
- Testing and Quality Assurance
- Documentation and Training
- Launch and Monitoring
- Iteration and Optimization
- Project Closure

# EXECUTION PHASE

The execution phase is where your generative AI project comes to life. This is the stage where you put your carefully crafted plans into action, developing and deploying your AI solution in a structured, iterative manner. The importance of this phase cannot be overstated, as it directly impacts the success and value delivery of your project.

During execution, you'll focus on developing and training your AI models, starting with a minimal viable product (MVP) and gradually refining and expanding its capabilities. This iterative approach allows you to validate assumptions, gather user feedback, and make data-driven improvements to your solution.

As you progress, you'll also work on integrating your AI solution into existing systems and processes, ensuring a smooth adoption across your organization. This requires close collaboration with various stakeholders, including end-users, business leaders, and IT teams.

Effective stakeholder engagement and clear communication are critical throughout the execution phase. By establishing regular communication channels and cadence, you can keep everyone informed, gather valuable feedback, and address any concerns or questions that arise.

Furthermore, proactive risk management is essential during execution. This involves identifying potential risks, such as data privacy concerns or model biases, and developing mitigation plans to address them. It also means creating contingency plans for dealing with technical challenges or roadblocks that may arise, ensuring that your project stays on track and delivers the expected value.

| | Step 1 | Step 2 |
|---|---|---|
| **Implement your generative AI solution in a structured, phased manner** | Develop and train your AI models iteratively, starting with a minimal viable product (MVP) | Gradually integrate your AI solution into existing systems and processes, ensuring smooth adoption. |
| **Engage stakeholders and maintain clear communication** | Identify all stakeholders impacted by your AI project, including end-users, business leaders, and IT teams. | Establish regular communication channels and cadence to keep stakeholders informed and gather feedback. |
| **Proactively manage risks and challenges** | Identify potential risks, such as data privacy concerns or model biases, and develop mitigation plans. | Create contingency plans for addressing technical challenges or roadblocks that may arise during execution. |

# MONITORING PHASE

The monitoring phase is an ongoing process that ensures your generative AI project stays on track and continuously improves. By closely tracking progress against your project plan and monitoring key metrics and KPIs, you can quickly identify any deviations or variances and take corrective actions as needed.

This phase also involves continuously evaluating the performance and quality of your AI solution in real-world scenarios, gathering user feedback and insights to understand how well it meets their needs and expectations.

Using the data and insights collected during monitoring, you can make informed, data-driven decisions to optimize and refine your AI models and processes. This iterative approach helps you maintain the accuracy, reliability, and effectiveness of your generative AI solution over time, ensuring that it continues to deliver value to your organization.

The monitoring phase is an ongoing process that ensures your generative AI project stays on track and continuously improves. By closely tracking progress against your project plan and monitoring key metrics and KPIs, you can quickly identify any deviations or variances and take corrective actions as needed.

**Closely track progress against your project plan:**

- Monitor key metrics and KPIs defined in the planning phase to ensure you're on track to meet your goals.
- Identify any deviations or variances from the plan and take corrective actions as needed.

**Continuously evaluate the performance and quality of your AI solution:**

- Assess the accuracy, reliability, and effectiveness of your generative AI models in real-world scenarios.
- Gather user feedback and insights to understand how well your AI solution meets their needs and expectations.

**Make data-driven optimizations and refinements:**

- Use the insights gathered from monitoring to make informed decisions on improving your AI models.
- Continuously fine-tune your models and processes based on real-world performance data and user feedback.

# ITERATION PHASE

The iteration phase is a critical component of your generative AI project, as it enables your team to continuously learn, improve, and refine your AI solution. By conducting thorough post-phase reviews and retrospectives, you can identify successful strategies, pinpoint areas for improvement, and document valuable lessons learned. These insights inform future project phases and help you optimize your processes and outcomes.

Embracing a culture of continuous improvement and refinement is key to long-term success. Regularly updating your project plans and roadmaps based on the knowledge gained from each iteration ensures that your generative AI initiative remains agile, relevant, and aligned with your organization's evolving needs.

Encouraging experimentation, learning, and innovation within your team fosters a growth mindset and drives the development of cutting-edge AI solutions.

| Learn from each completed phase and incorporate feedback | Embrace continuous improvement and refinement |
|---|---|
| Conduct thorough post-phase reviews and retrospectives to identify what worked well and areas for improvement. | Update your project plans and roadmaps based on the insights gained from each iteration. |
| Document lessons learned and best practices to inform future phases and projects. | Foster a culture of experimentation, learning, and innovation within your team. |

**Fill out the table below to plan and track your iteration phase activities**

| Post-Phase Review | Lessons Learned | Best Practices | Project Plan Updates | Experiments and Innovations |
|---|---|---|---|---|
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# BEST PRACTICES

The best practices checklist is an essential component of your generative AI project worksheet, serving as a guideline to ensure that you're adhering to industry standards and proven methodologies throughout the project lifecycle. By continuously referring to this checklist, you can minimize risks, optimize processes, and increase the likelihood of success for your AI initiative.

The checklist covers various aspects of the project, from planning and execution to monitoring and iteration. It includes key considerations such as data quality, model performance, stakeholder engagement, and continuous improvement. By regularly reviewing and applying these best practices, you can maintain a high standard of quality, consistency, and efficiency in your generative AI project.

## 10-Point Best Practices Checklist for Generative AI Projects

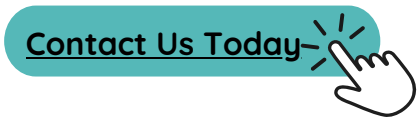
- Clearly define project objectives, scope, and success metrics aligned with business goals.
- Ensure data quality, relevance, and security throughout the project lifecycle.
- Employ iterative development methodologies, starting with a minimal viable product (MVP) and continuously refining based on feedback and performance.
- Establish a robust monitoring and evaluation framework to track progress, identify issues, and measure success.
- Foster a culture of collaboration, communication, and knowledge sharing among team members and stakeholders.
- Implement rigorous testing and quality assurance processes to validate model performance, reliability, and user acceptance.
- Prioritize user experience and engagement, incorporating user feedback and insights into the iterative development process.
- Maintain transparency and accountability in project governance, decision-making, and resource allocation.
- Stay up-to-date with the latest advancements, tools, and techniques in generative AI to ensure your project remains innovative and competitive.
- Continuously document lessons learned, best practices, and project outcomes to inform future initiatives and drive organizational learning.

# READY TO KICKSTART YOUR GENERATIVE AI JOURNEY?

## Partner with Blackstone+Cullen for Expert Guidance and Support

Join us every Thursday at 12 pm EST for our live webinar, "The Ever-Changing World of AI." Our expert panel discusses the latest advancements, real-world applications, and future trends in artificial intelligence.

Don't miss this opportunity to expand your knowledge and engage with industry leaders.

**Need help planning and executing your generative AI project?**

Our experienced team is here to guide you through every phase of the process. Contact us today for a free consultation and discover how we can help you unlock the full potential of generative AI for your organization.