

# AI Project Starter Checklist

Start with one useful task. You do not need a technical plan.

Take a few minutes to jot down your ideas before we talk.

Business / location: \_\_\_\_\_

## 1 Which task takes too much time?

Think about repeated emails, inquiries, documents, meeting notes or admin work.

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## 2 What tools do you use now?

List the email, Microsoft 365, forms, spreadsheets or other systems involved.

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## 3 What would a better result look like?

For example: less drafting time, fewer missed inquiries or more consistent replies.

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## 4 Who would review the output?

Choose the person who would check accuracy and approve messages or decisions.

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## 5 What is one small pilot worth exploring?

Pick a manageable task. Note who would use it and how you would judge the result.

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### A practical example

Organize inquiries and prepare draft replies for staff to check and approve before sending.

Describe the task first. Do not send passwords or confidential files with your inquiry.

Scope, software licences, costs and responsibilities are agreed before a pilot starts.

### Discuss your AI project with FSCS

[fscs.ca/ai-business-automation](https://fscs.ca/ai-business-automation) | 289-201-5911

Based in Oshawa. Serving Durham Region, including Port Perry and Scugog, and our wider service areas.