

Ready-to-Use Templates for 3T Team Implementation

Dr. Robert Li

Templates transform abstract frameworks into concrete action. These templates work across industries and use cases—customize the specific questions and metrics, but keep the structure.

AI Maturity Self-Assessment Template (MIT CISR Framework)

Example AI Maturity Self-Assessment Template (MIT CISR Framework) covering six dimensions with 30 yes/no questions. Here are some example questions - they can be modified to suit your organization and offerings:

Dimension	Assessment Questions
Strategy and Vision	<ol style="list-style-type: none">1. Is there a written AI vision or strategy aligned with overall business objectives?2. Have high-value AI use cases supporting key goals been identified? 3. Does executive leadership actively support and sponsor AI initiatives? 4. Are there clear, quantified success metrics for AI projects? 5. Is there a realistic, phased roadmap for AI adoption and scaling?
Data Infrastructure	<ol style="list-style-type: none">6. Is quality, fit-for-purpose data readily available for critical AI use cases?7. Are core data sources consolidated rather than siloed across teams? 8. Does the organization follow formal data governance and stewardship policies?9. Are data privacy and security controls consistently enforced? 10. Is there a standardized process for keeping data clean, well-structured, and up to date?

Dimension	Assessment Questions
Technology and Infrastructure	11. Is current IT infrastructure (on-prem/cloud) technically equipped to run AI/ML workloads? 12. Does the organization leverage cloud or hybrid platforms for scalable AI resource needs? 13. Can AI tools integrate smoothly with existing core business systems? 14. Are there sufficient computing resources and storage for current and planned AI projects? 15. Is the security architecture robust and regularly reviewed as AI scales?
Talent and Skills	16. Do most employees have a basic understanding of AI concepts and opportunities? 17. Is there sufficient in-house expertise in data science, ML, or AI engineering? 18. Are employees encouraged and willing to acquire AI-related skills? 19. Does the organization have or plan formal AI upskilling/training programs? 20. Has a hiring or external consulting strategy addressed core AI skill gaps?
Governance and Ethics	21. Are responsibilities and frameworks for AI governance established and documented? 22. Does the organization have published AI ethical guidelines or principles? 23. Are risk management and regulatory requirements assessed for each AI initiative? 24. Are there checks in place for bias, fairness, and transparency in AI outputs? 25. Can AI-driven decisions be clearly explained to non-technical stakeholders?
Organizational Culture	26. Does leadership promote innovation and calculated risk-taking with AI? 27. Are teams open and responsive to change driven by new technology? 28. Is there an organizational willingness to learn from failed or suboptimal AI projects? 29. Do different departments actively collaborate on AI initiatives? 30. Do employees tend to view AI as an opportunity, not a threat, for the business?

Scoring Guide: - 0–8: Foundational Stage - 9–16: Developing Stage - 17–24: Mature Stage - 25–30: Leading (AI Future-Ready) Stage

Pilot Program Charter Template

Section	Fields/Details
Project Overview	Project Name, Executive Sponsor, Project Manager, Start Date, End Date, Total Budget
Business Case	Problem Statement (describe current challenge), Strategic Alignment (link to company goals), Expected Benefits (quantified), Success Criteria and Metrics
Scope	In-Scope Items (specifically included), Out-of-Scope Items (explicitly excluded), Assumptions, Constraints
Stakeholders	Name, Role, Interest Level, Engagement Strategy for each
Key Deliverables	Deliverable, Due Date, Owner, Success Criteria
Success Metrics/KPIs	Metric, Baseline, Target, Measurement Frequency
Team and Resources	Name, Role, Time Commitment (per team member), Technology Requirements, Budget Allocation
Risk Register	Risk Description, Likelihood, Impact, Mitigation Strategy, Owner
Communication Plan	Audience, Message, Frequency, Channel, Owner
Approval Signatures	Executive Sponsor, Project Manager, IT Lead, Finance Lead, Date

Quarterly Red-Teaming Checklist

Month / Activity	Checklist Items
Month 1: Assessment and Planning	Review prior quarter's incidents; Update risk assessment (reflect new AI deployments); Schedule red-teaming exercises; Audit marketing data privacy practices; Review consent management systems; Test privacy request fulfillment procedures
Month 2: Active Testing	Red-teaming exercises (prompt injection, data poisoning, adversarial examples); Test model performance and drift detection; Evaluate bias/fairness across demographics; Information integrity assessment (Harari, 2024); Test incident response via tabletop exercise; Review third-party/vendor compliance
Month 3: Review and Remediation	Analyze results for patterns; Document findings/remediation steps with owners/due dates; Update protocols based on learnings; Refine containment strategies (Suleyman, 2023); Prepare quarterly report (metrics/trends) for leadership; Plan next quarter's testing focus areas

Month / Activity	Checklist Items
Continuous	Monitor AI system performance metrics daily; Log incidents in tracking system immediately; Weekly privacy rights request review; Monthly employee training on AI safety; Update documentation as systems change

Victory Journal Daily Template

Field	Prompts/Structure
Date	
Morning (3 min)	- Today's top 3 priorities; - How today advances our mission; - What obstacles might arise?
Evening (4 min)	- Victories (big and small); - What worked well?; - Tomorrow's focus; - Key learning from today

Weekly Victory Sharing Circle Template

Segment	Duration	Activities
Opening	2 min	Set purpose and context
Victory Sharing	20 min	Each person shares 1–2 victories, brief context
Team Celebration	5 min	Recognize patterns and collective wins
Photo for Victory Wall	3 min	Take group photo to capture the moment

Sprint Demo Agenda Template

Segment	Duration	Activities
Context	5 min	Sprint goal reminder, key metrics from last sprint
Demonstrations	25 min	5 stories × 5 min: Acceptance criteria review, live user value demo, Q&A for each story
Q&A and Feedback	10 min	Gather overall impressions and concerns
Next Sprint Preview	5 min	Preview upcoming priorities

Human-in-the-Loop Review Form (Google Forms)

Field	Type/Options
Reviewer Name	Dropdown
Item ID	Short answer
AI Output Summary	Paragraph
AI Confidence Score	Linear scale (0–100)
Approval Decision	Multiple choice (Approve / Reject / Request Changes)
Issues Found	Checkboxes (Accuracy, Completeness, Compliance, Bias, Other)
Specific Feedback	Paragraph
Recommended Action	Paragraph
Review Time Spent	Short answer (minutes)
Escalation Needed	Yes/No (if yes, explanation required)

30-60-90 Day Success Metrics Dashboard

Metric Group	Metrics/Fields
Pilot Program Health	Days elapsed, Current phase, On track / At risk / Off track, Blockers count, Risk count
Adoption Metrics	Pilot users trained, Daily active users, Adoption rate (%), Feature utilization rate
Performance Metrics	AI accuracy/confidence, System uptime (%), Avg. response time, Errors logged count
Business Impact	Time saved/user weekly, Cost savings, User satisfaction score, Productivity improvement (%)
Milestones	Milestone, Target date, Actual date, Status, Notes

Review this dashboard weekly with the pilot team, bi-weekly with stakeholders, and monthly with leadership.

Quarterly OKR Template

Field	Structure/Prompts
Objective	Clear, qualitative statement of achievement
Key Results	3–5 quantitative measures of success
Owner	Person accountable
Quarter	Q1/Q2/Q3/Q4 Year
Current Status	On track / At risk / Off track
Overall Score	0.0–1.0
Individual KR Details	Description, Baseline, Target, Actual, Score (0.0–1.0), Status
Progress Updates	Date, Update, Challenges, Next steps
Retrospective	What worked well, What to improve, Learnings for next quarter

Score 0.7–0.8 is target range; consistently scoring 1.0 means OKRs aren't ambitious enough.

Critical Warning Signs and Course Corrections for AI Initiatives

Most failed AI initiatives show warning signs months before collapse. Organizations that recognize and respond to these signals early can course-correct; those that ignore them waste significant resources. Monitor these indicators monthly and take immediate action when you see patterns.

Warning Sign 1: Low Adoption After 4 Weeks

Indicator: If pilot users aren't using the AI tool at least 3 times per week after 4 weeks, the implementation is failing.

Root Causes: - Tool doesn't solve real problem (users work around it) - Tool too difficult to use (friction exceeds value) - Inadequate training or support (users don't understand how to get value) - Integration gaps (tool doesn't fit workflow) - Performance issues (tool too slow, inaccurate, or unreliable)

Course Correction: - Conduct in-place interviews with non-users to understand barriers - Simplify the use case by reducing scope or improve UX - Add hands-on training sessions - Fix integration issues - If fundamental mismatch, pivot to different use case, replace, or eliminate entirely

Warning Sign 2: Declining Use After Initial Spike

Indicator: If users try the tool then abandon it, you have a value realization problem and the pilot to established stack process was rushed or improperly conducted (there may have been bias).

Root Causes: - Initial novelty wears off without sustained value - Outputs require too much correction (human oversight burden too high) - Users don't trust AI outputs (accuracy issues) - Manual process still required (automation incomplete) - No reinforcement or reminder to use tool

Course Correction: - Identify power users and understand what makes them stick and whether this is scalable i.e. others can use it in the same way - Improve output quality through retraining or tuning - Implement periodic "check-ins" or reminders - Add features that increase stickiness - Celebrate wins publicly to drive adoption

Warning Sign 3: High Error Rates (Over 15% Requiring Correction)

Indicator: If more than 15% of AI outputs require significant human correction, the system isn't ready for scaling.

Root Causes: - Training data doesn't match use case well - Model not suited for task complexity - Edge cases not handled properly - Insufficient testing before

pilot launch - Confidence thresholds set incorrectly

Course Correction: - Expand training data with real-world examples - Adjust confidence thresholds (lower threshold increases human review, improves accuracy) - Implement better error handling for edge cases - Consider different model or approach - Narrow the use case to areas where accuracy is higher

Warning Sign 4: Organizational Resistance or Pushback

Indicator: If stakeholders or departments resist the initiative, you have a change management failure.

Root Causes: - Insufficient communication about benefits - Fear of job displacement - “Not invented here” syndrome - Previous failed technology initiatives - Lack of visible leadership support

Course Correction: - Increase communication frequency and transparency - Reframe AI as augmentation not replacement - Involve resisters in design decisions (give them ownership) - Share early wins and user testimonials - Ensure executive sponsors are visibly engaged

Warning Sign 5: Budget Overruns (Over 20% Above Plan)

Indicator: If costs exceed projections significantly, you have planning or scope problems.

Root Causes: - Underestimated usage-based pricing - Excessive AI technology stack - Scope creep without budget adjustment - Hidden integration or customization costs - Unplanned training or support needs - Vendor pricing changes

Course Correction: - Implement usage monitoring and optimization - Revisit scope and re-align budget or cut features - Audit your technology stack - Renegotiate vendor contracts if possible - Forecast costs monthly and adjust expectations - Consider switching to options with more acceptable pricing models

Warning Sign 6: Technical Debt Accumulating

Indicator: If workarounds, patches, and “temporary” solutions are piling up, you’re building on unstable foundation.

Root Causes: - Moving too fast without proper architecture - Insufficient testing before deployment - Lack of documentation - Inadequate technical expertise - No time allocated for refactoring

Course Correction: - Schedule dedicated technical debt sprint (1-2 weeks) - Document all systems and processes properly - Bring in technical consultant for architecture review - Slow down new feature development temporarily - Invest in training for technical team

Warning Sign 7: Regulatory or Compliance Issues

Indicator: If you discover privacy, security, or compliance gaps, stop immediately.

Root Causes: - Inadequate understanding of regulatory requirements - Insufficient legal review before deployment - Data governance policies not enforced - Third-party vendors not properly vetted - Lack of audit trails or documentation

Course Correction: - Pause deployment until compliance issues resolved - Conduct full compliance audit with legal counsel - Implement proper data governance immediately - Review all vendor contracts and DPAs - Document all AI decisions and human oversight - Establish compliance review checkpoints