Thank you for downloading

Thank you for downloading this AI strategy template from House of Silver. We hope it helps you turn AI experiments into a clear direction that your collective team owns.

The template gives you the headings and the questions to work through. The answers are yours to write, because a strategy only works when it fits your people, your data, and the way your organization works. Bring the right people into the room, be honest about where you stand today, and expect the first version to evolve.

If you would value an experienced partner along the way, whether to facilitate a leadership session, challenge your priorities, or help your teams adopt what you decide, we would be glad to hear from you.

Erik
Founder, House of Silver
hello@houseofsilver.ai | houseofsilver.ai

About House of Silver
House of Silver helps organizations adopt AI in ways that strengthen their people, keep their data safe, and deliver real impact. Sections 2 to 6 of this template follow the five areas of the House of Silver AI Readiness Framework. To see where your organization stands on each, take the free AI Readiness Assessment at houseofsilver.ai.

[Organization name] AI Strategy

Version	
Strategy owner	
Approved by	
Effective date	
Next review	

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How to use this template: each section has a heading, questions to answer and points to consider, in italics. Some questions include an example sentence to get you started; adapt it or replace it. For sections 2 to 6, start by noting where you are today on a scale of 1 to 5 and where you want to be in 12 months. Write your strategy text under each heading, then delete the italic guidance.

1. Purpose and ambition

Questions to answer

- *What business goals or problems should AI help with over the next 12 to 24 months?*

  > ***Example:*** *Over the next [two years], we will use AI to [reduce time spent on routine documentation, respond to clients faster, and free our specialists for higher-value work].*

- *In two years, what will be different for our customers or clients, and for our people?*

  > ***Example:*** *By [year], every team uses AI in its daily work, our clients get faster and better answers, and our people spend more of their time on work that needs their expertise.*

- *What will we deliberately not use AI for?*
- *Where should AI assist our people, and where should it carry out work on our behalf?*
- *How much time, money and attention are we prepared to invest this year?*

Things to consider

- *Agree on what AI is for before choosing tools or use cases. Everything else follows from this.*
- *Decide early where AI adds value and where human judgment is non-negotiable. It makes every later choice easier.*

2. Data quality

Questions to answer

- *Where does our most important knowledge live today, and how complete is it?*

  > ***Example:*** *Our core knowledge lives in [our document management system, shared drives and email].*

- *Which information would AI need to be genuinely useful to us? Is it current, findable and trusted?*
- *Who owns keeping our key information clean and up to date?*
- *Who keeps the context our AI relies on current, and how do mistakes turn into updated guidance?*
- *Which single data fix would unlock the most value?*
- *Should we consider capturing key insights from our existing data? Format it and store it in a place where our existing or future AI tools will be able to reach it or work on it?*

Things to consider

- *AI is only as useful as the information it can reach. Scattered, outdated or untrusted data limits everything else.*
- *The quality of what AI gives back depends on the context you give it. Well-organized, current information turns a generic answer or action into a useful one.*

3. Process documentation

Questions to answer

- *Which of our recurring processes are documented, and which live only in people's heads?*
- *Where do we lose the most time to manual steps, handoffs or rework?*
- *Which three processes should we redesign with AI, rather than simply speed up?*

  > ***Example:*** *We will start with [proposal writing, client reporting and onboarding], because they are frequent, time-consuming and easy to measure.*

- *Who knows these processes best, and how will we involve them?*

- *In each process we redesign, which steps are done by a person, which by AI, and where does a person check the work before it moves on?*
- *Where does work pass from one AI tool or agent to another, and who watches those handoffs?*

Things to consider

- *You cannot improve, or automate, work that only exists in people's heads.*
- *Map your workflows before you decide what task or process you target. Redesigning workflows is easier when you can see the full picture of your work.*

4. Digital literacy

Questions to answer

- *How comfortable are our people with AI today, role by role?*
- *What does a good level of AI skill look like for each role?*

  > ***Example:*** *Every employee can use approved AI tools safely for everyday tasks, such as [tasks].*

- *Who are our natural champions, and how will we support them?*

  > ***Example:*** *We will appoint [one] AI champion per [team or office], with [two hours] a month to learn, test and support colleagues.*

- *What concerns or resistance do we expect, and how will we address them openly?*
- *How might roles and responsibilities change as AI takes on more of the work?*
- *If AI takes on routine work, how will newer staff build the judgment that work used to teach them?*

Things to consider

- *Adoption is a people challenge before it is a technology challenge. Confidence grows with practice.*
- *Champions from every department, meeting regularly, spread skills and confidence faster than a top-down rollout. Give them time, a forum and visible support.*

5. Leadership alignment

Questions to answer

- *Who owns AI at the leadership level, and what can they decide on their own?*

  > ***Example:*** *[Name or role] owns this strategy and chairs a steering group of [roles] that meets [monthly] to decide on priorities, budget and risk.*

- *Does the leadership team agree on why we are doing this? Where do views differ?*
- *Which guardrails need to be in place first, and who sets them?*
- *How will leaders show, through their own use of AI, that this matters?*

Things to consider

- *Without a clear owner and agreed decision rights, every AI initiative becomes a negotiation, and good ideas stall.*
- *Form a dedicated AI team early, combining strategic, technical and teaching skills, with one named point of contact. It keeps decisions consistent as interest grows.*

6. Learning infrastructure

Questions to answer

- *How will we capture what we learn from pilots, so knowledge does not leave with the people involved?*
- *Where will shared prompts, agents, playbooks and examples live, and who will maintain them?*

  > ***Example:** Shared prompts, examples and lessons learned live in [location], maintained by [role] and reviewed [quarterly].*

- *How will new hires learn our way of working with AI?*
- *How will we share both successes and failures across the organization?*
- *How will lessons from AI mistakes flow back into our guidance, and who confirms the fix worked?*

Things to consider

- *Organizations that capture what they learn compound it. Those that do not keep relearning the same lessons.*
- *Teach more than AI topics. Teach the reasoning behind your practice as well. People build good judgment when they understand why choices were made.*

7. People and AI: who does the work

Questions to answer

- *For each kind of work, does AI assist a person, draft for review, act within set limits, or act and report back?*

  > ***Example:** By [year], AI in [team] moves from assisting our people to drafting [client reports] for their review, while [client advice] stays with our people.*

- *Who will carry the three ongoing responsibilities: keeping the knowledge our AI relies on current, directing and checking AI work in each team, and running the system as a whole?*
- *Where will AI agents extend our teams, and how will hiring, team design and capacity planning change as they do?*

Things to consider

- *A tool helps a person do the work. An agent does work on your behalf, so it needs an owner, the way a new colleague needs a manager.*
- *Results come from redesigning the work, not from the tools alone.*

8. Tools, platforms and partners

Questions to answer

- *Which platforms will we standardize on, and where do we allow exceptions?*

  > ***Example:** We standardize on [platform] for everyday work. Other tools need approval through [process].*

- *When do we buy a ready-made tool, configure what we already own, or build something of our own?*
- *Where must our data live, and which vendors meet that requirement?*
- *How will we compare costs as usage grows, for example per-user licenses versus pay-per-use?*
- *Could the agents and workflows we build move to another platform if we needed them to?*
- *Which outside partners do we need, and for what?*

Things to consider

- *Tool choices are easy to make and hard to undo. Decide the principles first, then the products.*

- *Software changes faster than strategy documents. Keep tool choices in a separate, regularly updated list, and keep the strategy about principles.*

9. Risks, assumptions and non-negotiables

Questions to answer

- *What are we assuming about tools, costs, skills and our market that could turn out to be wrong?*
- *What do we lose if we wait a year? What could go wrong if we rush?*
- *Which lines will we not cross, whatever the business case?*

  > ***Example:*** *Whatever the business case, we will not [put confidential client information into tools we do not control, or let AI make decisions about people].*

- *What could go wrong when AI acts rather than answers: a message sent, a file changed, a cost that runs away?*
- *Which laws and regulations shape what we can do, and who keeps track of changes?*
- *What would make us pause or change course?*

Things to consider

- *Every strategy rests on assumptions. Writing them down tells you what to watch.*
- *Do not wait for certainty. A solid baseline you revise beats a perfect plan that arrives after the market has moved.*

10. Priorities and the first 90 days

Questions to answer

- *Which use cases came up in sections 1 to 9, and which offer the most value for the least effort?*
- *Which three will we start in the next 90 days? Record them in the table below.*
- *For each one, what will AI do, what will people do, and where will a person check the work?*
- *What will we stop, pause or postpone to make room for them?*

Initiative	Owner	Done by	Success measure	Start date

Things to consider

- *Strategy becomes real when it turns into a few owned, measurable moves.*
- *Run short pilots and measure time, effort and quality against the current way of working. The results show where AI helps and where people must stay in charge.*

11. Measuring progress and review

Questions to answer

- *Which measures will we track: adoption, time saved, quality, client impact, staff confidence?*

  > ***Example:*** *We will track [the share of staff using AI each week, hours saved on selected processes, and the quality of AI-assisted work], reviewed [quarterly] by [the steering group].*

- *How will we judge the quality of AI work: how often it is wrong, how often people correct it, and what each task costs?*
- *How often will we review each AI agent we run, and retire the ones that do not pay off?*
- *What is our baseline today for each one?*
- *How often will we review progress, and who attends?*
- *When will we revisit this strategy as a whole?*

  > ***Example:*** *The strategy owner reviews this strategy every [12 months], and sooner if our business, the technology or the results change significantly.*

Things to consider

- *Measure before you start. Without a baseline, you cannot show what changed.*
- *Keep the measures few, simple and visible. What gets measured gets discussed and can defend future investments.*