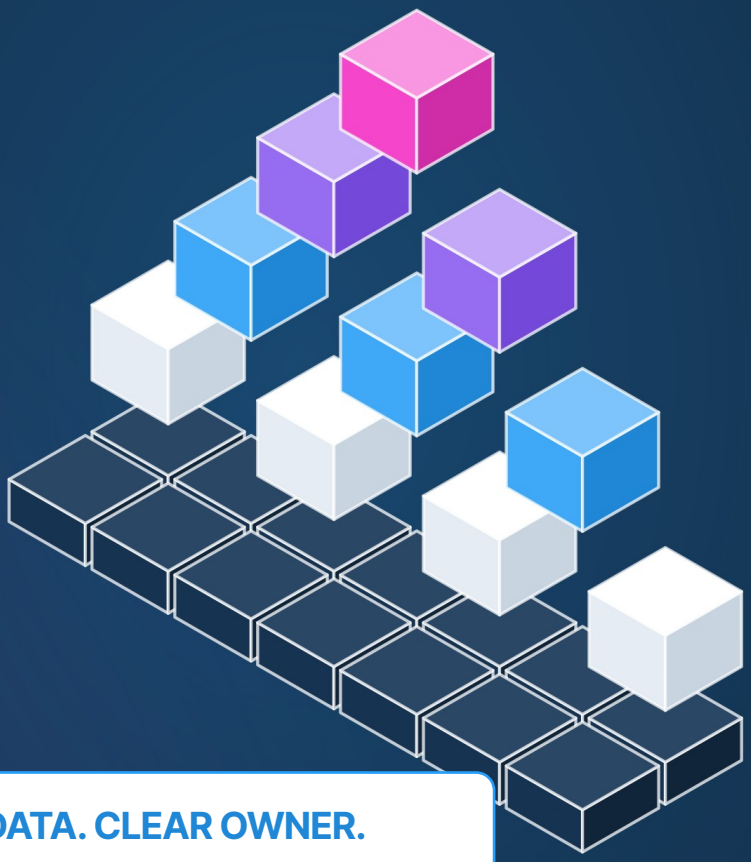
OPERATIONS INSIDER

LEAN · OPERATIONS · LEADERSHIP

THE MANAGER'S AI IN OPERATIONS QUICK START CHECKLIST

Score one plant in an hour, with evidence you can point at.



REAL LOSS. GOOD DATA. CLEAR OWNER.

START HERE

How to Use This Check

One plant or one business unit, one hour with the people who own the processes and the data, twenty-five statements, one number.

01 LOOK	02 SCORE	03 ACT
Sit with the operations manager and the person responsible for data or IT. Open the real documents: use case list, business cases, pilot reports, data sources.	Score each statement from 0 to 4. Without a document, a data set or a dashboard you can point at, the score is 2 or lower.	Pick the weakest block and agree one action with an owner and a date before you leave.

The Scoring Scale

POINTS	MEANING
0	Not in place.
1	Happens occasionally, depends on individuals.
2	Partly in place, not consistent across use cases.
3	Mostly in place and visible in the work.
4	Consistently in place, visible, reviewed and improved.

> **WHY START WITH A CHECK**
>
> **Most AI efforts in operations do not fail on algorithms. They fail on unclear problems, poor data, missing owners and pilots that never end. The check shows which of these applies to you.**

Before You Start

- **Scope:** one plant or business unit with at least one AI idea, pilot or application in discussion.
- **Evidence:** the list of use case ideas, any business case or pilot report, the main data sources and the people who own them.
- **Tone:** you check the system around AI, not the enthusiasm of individuals. Ask how a decision was made, not who wanted which tool.

THE CHECK

01 Strategy and Use Cases

NO.	CHECK	SCORE 0 TO 4
01	AI use cases start from a named operational loss or problem with a baseline in numbers, not from a tool or a vendor demo.	
02	All use case ideas are kept in one portfolio and scored for value and feasibility with the same scale.	
03	Management has decided which three use cases come first, and why the others wait.	
04	Each use case has a business owner from operations who wants the result and will use it.	
05	The process behind each use case is stable and standardized before AI is applied to it.	

02 Data and Process Foundation

NO.	CHECK	SCORE 0 TO 4
06	For each use case the needed data is listed with source, history, quality and owner.	
07	Data quality is measured, for example missing values, wrong time stamps and wrong labels, and the weak points are fixed at the source.	
08	Machine and process data are connected from the shop floor (OT) to the IT side in a secure and documented way.	
09	Labels or ground truth exist for supervised use cases, created by process experts with a written definition.	
10	Data ownership and access rights are clear, and personal data is avoided or protected by design.	

THE CHECK

03 Pilot and Business Case

NO.	CHECK	SCORE 0 TO 4
11	Every pilot has a written business case with one-time cost, running cost, benefit per year and payback.	
12	Every pilot has target values, a fixed duration and written stop criteria agreed before it starts.	
13	Pilot results are reviewed every week against the targets, on the real process, not only on a test data set.	
14	The decision to stop, extend or scale is taken at a set date by the sponsor and recorded.	
15	The pilot scope includes the integration into the process: who acts on the result, how, and within what time.	

04 People and Roles

NO.	CHECK	SCORE 0 TO 4
16	Operators and team leaders are involved from the first week, test the solution and can give feedback that changes it.	
17	Roles are clear: business owner, process expert, data and AI specialist, IT and OT engineer, sponsor.	
18	People who use AI results are trained in what the system can and cannot do, and when to override it.	
19	Changes to jobs and tasks are explained openly and early, and employee representatives are involved where they exist.	
20	The organization builds its own skills step by step and does not depend on one external partner for every change.	

THE CHECK

05 Governance and Scaling

NO.	CHECK	SCORE 0 TO 4
21	Each AI application is classified by risk, and high risk uses have additional checks before go-live.	
22	Each model in use has a model card with purpose, data, performance, limits, version and owner.	
23	Models in use are monitored monthly for performance and drift, with a threshold that triggers a review.	
24	Benefits are measured after go-live against the baseline by a named owner, and reported with the operational KPIs.	
25	A scaling plan exists that rolls out proven solutions to further lines or sites with a standard package.	

Your Result

BLOCK	POINTS	OUT OF
01 Strategy and Use Cases		20
02 Data and Process Foundation		20
03 Pilot and Business Case		20
04 People and Roles		20
05 Governance and Scaling		20
TOTAL		100

YOUR RESULT

Read the Number

The total tells you how much of your AI work is experiment and how much is system. The weakest block tells you where to start.

TOTAL	WHAT IT MEANS	WHAT TO DO FIRST
0 to 39	Curiosity. Ideas and demos, no owner, no baseline, no data plan.	Name three operational losses in numbers. Collect the ideas in one portfolio.
40 to 59	Pilots. Some pilots run, few end with a decision, data is fixed by hand.	Write business cases and stop criteria. Decide every running pilot.
60 to 79	Applications. A few solutions work in production, mostly thanks to individuals.	Introduce model cards, monitoring, clear roles and benefit tracking.
80 to 100	Capability. AI is part of how the plant improves, governed and measured.	Scale proven solutions with a standard package. Build internal skills.

Your Three Priorities

NO.	WHAT TO IMPROVE	FIRST ACTION	OWNER	DUE

THE RULE FOR EVERY ACTION

Owner and date, or it did not happen. Repeat the check every six months and compare the blocks, not the feeling.

What to Do Next

NEXT STEP	WHAT YOU GET
AI IN OPERATIONS STARTER KIT	The guide for the first 30 days, plus the workbook with use case portfolio, data readiness check, business case and pilot tracker.
AI IN OPERATIONS EXCELLENCE BUNDLE	The full playbook, a two-day workshop pack, eight templates, the Excel system for portfolio, monitoring and benefits, and a ready-to-use workshop deck.

Both are available at operationsinsider.com.