

# APPENDIX E: Your AI Performance Flywheel Momentum Checklist

## How to Use This Appendix

This checklist is your practical guide to applying the **AI Performance Flywheel** across every stage of your organization's AI journey. Whether you're launching a new initiative, scaling an early success, or embedding AI as a source of continuous innovation, use this tool to assess your current momentum, identify red flags, and create an action plan. Complete the diagnostic to determine your readiness, then use the phase-specific checklists and quick-reference guide to accelerate progress and sustain long-term impact. Chapter 5 introduced the AI Performance Flywheel as a system for turning AI potential into sustained business results. To help you implement this framework effectively, this appendix provides detailed checklists for each phase: Foundation, Execution, Scale, and Innovation. These checklists offer a step-by-step guide to building momentum, overcoming challenges, and maximizing the impact of your AI initiatives. A quick-reference guide is also included to reinforce the core elements of each phase.

## Foundation Momentum

Start with a visualization so impactful that leadership can't look away.

- Identify your highest-impact visualization opportunity.
- Select appropriate tools based on audience and data.
- Create your first “impossible to ignore” insight.
- Document and share early wins.

## Execution Momentum

Tailor each visualization to match the pain points of different stakeholders.

- Map visualization needs by stakeholder group.
- Build your visualization toolkit.
- Establish feedback loops.
- Create cross-functional visualization opportunities.

## Scale Momentum

Connect department-level insights to drive enterprise-wide transformation.

- Connect department-level insights.
- Build visualization capability in teams.
- Document and share success patterns.
- Create visualization champions.

## Innovation Momentum

Teach teams to recognize visualization opportunities. This is how the flywheel keeps spinning.

- Establish an innovation pipeline.
- Train teams on visualization thinking.
- Create space for experimentation.
- Build a long-term visualization strategy.

## Flywheel Phases Quick-Reference Guide

This quick-reference guide provides a practical summary of the critical elements for successful implementation of each AI Performance Flywheel phase. Use it to ensure you're focusing on the essentials for building momentum in the Foundation, Execution, Scale, and Innovation phases.

## Foundation Phase Essentials

- Tool selection criteria
- Stakeholder mapping
- Impact measurement

## Execution Phase Essentials

- Resistance management
- Success demonstration
- Momentum building

## Scale Phase Essentials

- Cross-functional integration
- Capability building
- Innovation fostering

## Innovation Phase Essentials

- AI opportunity identification
- Rapid prototyping
- Continuous learning culture

# Diagnostic Tool: Assessing Your AI Readiness

Before diving into how Sarah applied the AI Performance Flywheel discussed in Chapter 5, let's take a moment to assess where your organization stands in its AI journey. Momentum is the difference between success and stagnation, whether your company is launching AI for the first time or struggling to scale existing efforts.

**The AI Momentum Diagnostic Checklist Helps You:**

- **Evaluate Your Current AI Adoption Stage:** Are you ready to scale, or do you need to refine your foundation first?
- **Identify Momentum Blockers:** What's preventing AI from delivering real impact?
- **Develop an Action Plan:** Use your results to determine what steps to take next.

**How to Use This Checklist:**

Follow these five steps to assess your AI readiness and plan your next moves:

1. **Step 1:** Complete the Current State Assessment to get a high-level view of your organization's AI maturity.
2. **Step 2:** Use the Scoring Guide and Interpretation reference to determine what your Current State Assessment scores mean for your AI momentum.
3. **Step 3:** Use the Phase Readiness Assessments to determine whether your organization is prepared to move forward in the AI Performance Flywheel.
4. **Step 4:** Review Red Flags to identify risks and blockers.
5. **Step 5:** If needed, use the Action Planning Template to develop a structured plan for overcoming challenges.

**Step 1: Current State Assessment:**

Instructions: Rate each statement from 1 to 5 (1 = Strongly Disagree, 5 = Strongly Agree).

- We have a clear strategy for how AI will create business value.
- Our leadership team actively champions AI initiatives.
- Employees understand how AI will impact their work.
- We have successfully completed at least one AI pilot.
- We can measure and demonstrate AI's impact on business metrics.
- Different departments collaborate effectively on AI initiatives.
- We have the necessary data infrastructure for AI implementation.
- Our teams trust AI-generated insights and recommendations.
- We have a process for identifying new AI use cases.
- Our AI initiatives align with broader business objectives.

**Step 2: Scoring Guide & Interpretation:**

Total Score → What It Means for Your AI Momentum

- **40–50: Strong Momentum:** AI is well-integrated into business strategy. Focus on optimizing and expanding AI impact. Recommended next step: drive Innovation Momentum through continuous improvement strategies.
- **30–39: Building Momentum:** AI initiatives are progressing, but gaps exist in execution or scaling. Focus on strengthening processes and stakeholder engagement. Recommended next step: refine Execution Momentum with structured change management and cross-team collaboration.
- **20–29: Early Stages:** AI adoption is in its infancy; foundational structures need development. Focus on establishing clear goals and building initial trust. Recommended next step: lay the groundwork for Foundation Momentum by defining an AI strategy and securing leadership buy-in.
- **Below 20: Significant Barriers:** AI initiatives are struggling due to a lack of clear strategy, data infrastructure, or stakeholder support. Focus on fixing foundational issues before further investment. Recommended next step: address barriers before progressing - prioritize leadership alignment, data quality, and education.

**Step 3: Phase Readiness Assessments:**

Once you've identified your overall AI momentum level, use the following Phase Readiness Assessments to determine if you're prepared to advance in the Flywheel.

**Foundation Momentum Readiness**

- We've identified a specific business problem AI can solve.
- We have clean, accessible data for this use case.
- Key stakeholders are engaged and supportive.
- We have baseline metrics to measure impact.
- We can start small with minimal disruption.
- We have resources for initial implementation.
- We've assessed potential risks and constraints.
- We have a clear communication plan.

**Ready to move forward? If you checked six or more, proceed to Execution Momentum.**

**Execution Momentum Readiness**

- Initial pilot shows measurable success.
- Teams are trained on AI capabilities.

- We have feedback mechanisms in place.
- Workflows are documented and standardized.
- Change management plan is developed.
- Success metrics are defined and tracked.
- Resources are allocated for scaling.
- Leadership actively supports expansion.

**Ready to move forward? If you checked six or more, proceed to Scale Momentum.**

**Scale Momentum Readiness**

- First department shows sustained success.
- Other departments express interest.
- Infrastructure can support expansion.
- Cross-functional teams are established.
- Knowledge-sharing processes exist.
- Success patterns are documented.
- Resources available for broader rollout.
- Clear governance structure in place.

**Ready to move forward? If you checked six or more, proceed to Innovation Momentum.**

**Innovation Momentum Readiness**

- Multiple departments using AI successfully.
- Teams proactively suggest AI use cases.
- Innovation pipeline is established.
- Quick experimentation process exists.
- Success metrics drive new initiatives.
- Culture embraces AI-driven change.
- Resources for continuous improvement.
- Strategic alignment process in place.

**Ready to move forward? If you checked six or more, you are in the innovation phase of AI maturity.**

**Step 4: Identifying Red Flags and Creating an Action Plan:**

If your organization scored low in any phase or flagged challenges, review the Red Flags in Table E.1 and use the Action Planning Template to overcome barriers.

**TABLE E.1 Red Flags to Watch For**

Phase	Common Barriers
Foundation	No clear success metrics Stakeholder resistance Poor data quality Unclear value proposition
Execution	Low user adoption Inconsistent results Workflow disruptions Communication gaps
Scale	Siloed implementations Resource constraints Loss of momentum Quality inconsistencies
Innovation	No new AI use cases Declining engagement Budget limitations Strategic misalignment

**Step 5: Action Planning Template:**

If your organization faces barriers in any phase, use the structured action plan in Table E.2 to address challenges and build momentum.

**TABLE E.2 Action Planning Template**

Step	Your Response
Current State	What's the specific challenge? Who is affected?
Desired State	What does success look like? What metrics will improve?
Action Steps	What immediate actions can we take? What resources do we need? Who needs to be involved?
Timeline	When will we start? What are key milestones? When do we expect results?

**What to Do Next:**

- If your organization scored low in Foundation Momentum, revisit Chapter 5, “The AI Performance Flywheel: Turning AI Potential into Business Results,” to build early traction.
- If you are stuck in Execution Momentum, turn to Part 2, “Strategic Priorities (The Five AI Success Pillars),” to leverage the Five AI Success Pillars for stronger implementation strategies.
- If you are preparing for Scale Momentum, review the visualization tools in Part 3, “Bringing AI to Life (Visualization as a Catalyst for Change),” to drive broader adoption.
- If you are ready for Innovation Momentum, review Chapter 13’s Scaling & Innovation Momentum Cycle (Figure 13.1) to transform successful AI initiatives into continuous business improvement.