

01 / MONTHLY LEARNING REVIEW

Make AI knowledge useful.

Review the work before the headlines. Complete one sheet for each priority opportunity.

Company / team: _____

Date: _____

01 Keep one opportunity list

Recurring question, manual task, or awkward handoff; business owner

Information needed, likely value, and next question to resolve

02 Review relevant ideas and readiness

Which capability could help? What is evidence, and what is assumption?

Approved information, access, and review owner; what a small test needs

Testing, review, tool, and maintenance costs; consequences of an error

03 Choose one next step

☐ Adopt ☐ Test ☐ Watch ☐ Leave alone

Reason, evidence still needed, owner, and next review date

02 / QUARTERLY RESET

Make AI knowledge useful.

Keep the roadmap short enough that someone can own each next step.

Quarter / team: _____

Date: _____

04 Review what changed

What did we try, and what helped?

What created extra review work, cost, or unexpected limitations?

What changed in business priorities or the operation?

05 Keep a practical roadmap

Adopt what has earned its place. Test with a defined pilot. Watch what is not ready.
Leave an idea alone when cost or distraction outweighs its value.

Priority 1: decision, next action, owner, and review date

Priority 2: decision, next action, owner, and review date

Priority 3: decision, next action, owner, and review date

What evidence would justify the next investment?
