

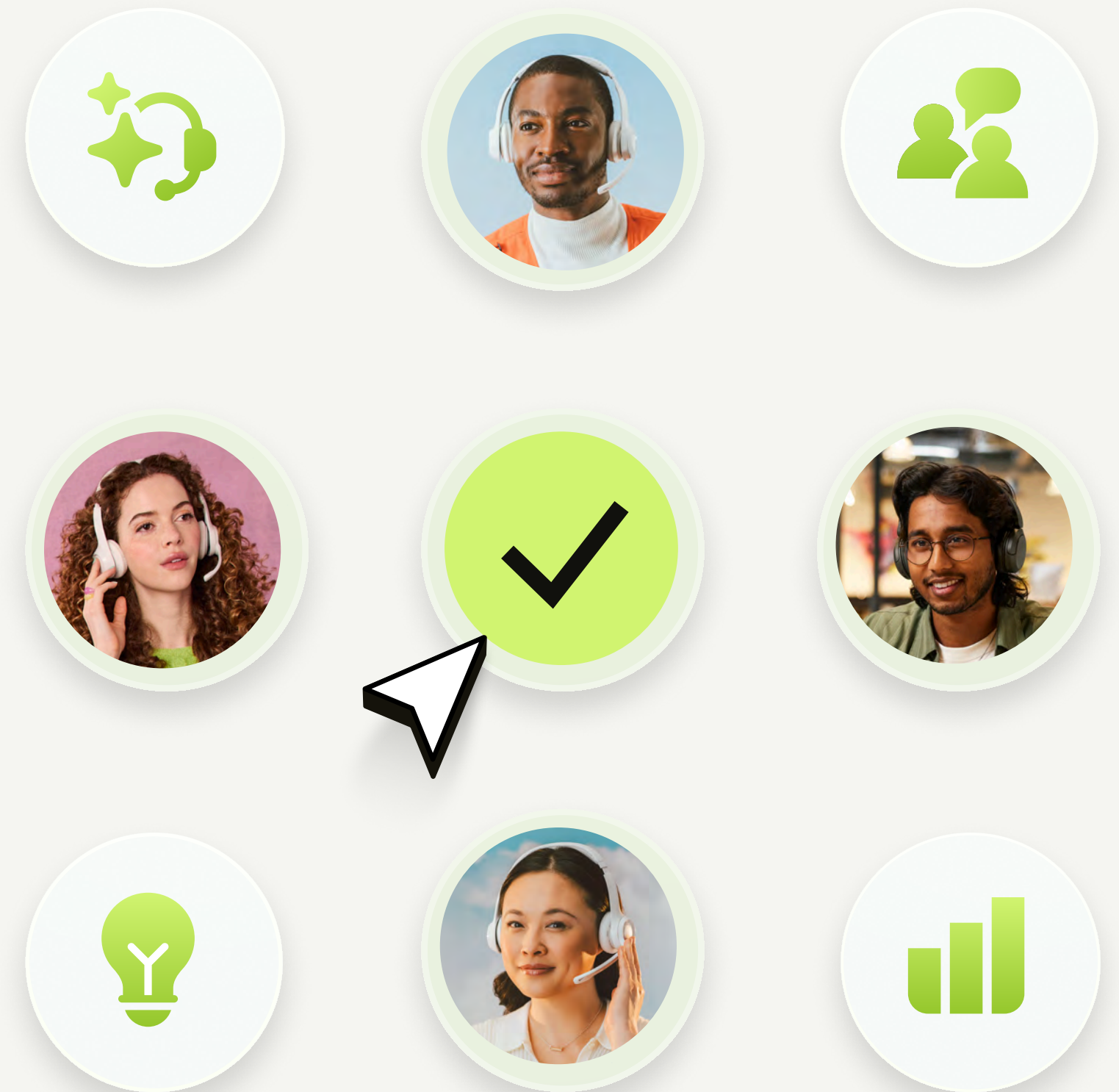
zendesk DIGITAL WORKSHOP

AI masterclass

Your companion sheet to
building an AI adoption plan

How to use this worksheet

Designed to accompany **Workshop 1: Building an AI Adoption Plan**, use this sheet to assess your company's AI maturity, identify where to start or expand your efforts with high-impact use cases, build an actionable AI adoption plan, and get ready to launch.



STEP 1

Assess your company’s AI maturity

First, take a moment to assess your company’s AI maturity by answering the below prompts.



Check all that apply:

- ☐ My company has a structured knowledge base in place.
- ☐ My company has clearly defined KPIs for measuring AI impact.
- ☐ My company has deployed automation or AI agents in service channels.
- ☐ My company has identified specific use cases to automate with AI.
- ☐ My company has a dedicated team of stakeholders responsible for AI adoption.

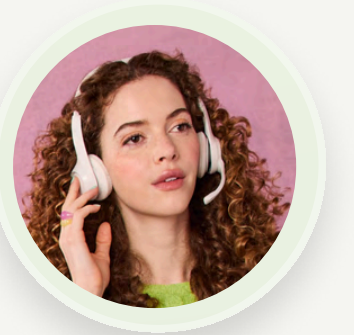


Pro tip: Be realistic and honest in your assessment. Knowing your maturity level is essential for setting achievable AI goals.

Next, tally your responses to identify your stage of maturity.

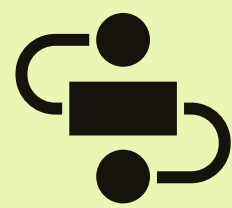
✓ # of checks	✦ Maturity level	📌 What it means and next steps
0-1 check	Starter	Your company is just getting started with AI. Your first step is building foundational elements.
2-3 checks	Riser	Your company is ready to focus on expanding your current use cases and optimizing processes.
4-5 checks	Champion	Your company is actively scaling your AI solutions and ready to focus on measuring and continuously improving your AI implementation.

STEP 2



Identify where to start or expand

Now that you've assessed your company's level of AI maturity, you can better determine the next step in your AI journey. Consider our three foundational AI use cases—and identify which outcomes and goals you want to achieve.



Automate

If you want to **improve your customer experience** and deliver exceptional service at scale

And achieve results like:

Automate 80% or more of your interactions—allowing your team to dedicate their expertise and creativity to driving your business forward



Optimize

Improve your admin experience and make it easier to enhance your service workflows

And achieve results like:

Reduce **up to 85%** in operational costs



Assist

Improve your agent experience and increase their productivity

And achieve results like:

Increase agent productivity by **20%** and give agents up to **50%** of their time back to solve more complex and high-touch issues



Pro tip: Start with one use case. In industries where accuracy and compliance are paramount—such as finance and healthcare—many customers begin with **Assist** to give agents AI-powered guidance to maintain quality and regulatory standards. Meanwhile, retail and software companies—who have high, repetitive volume—often start with **Automate**.

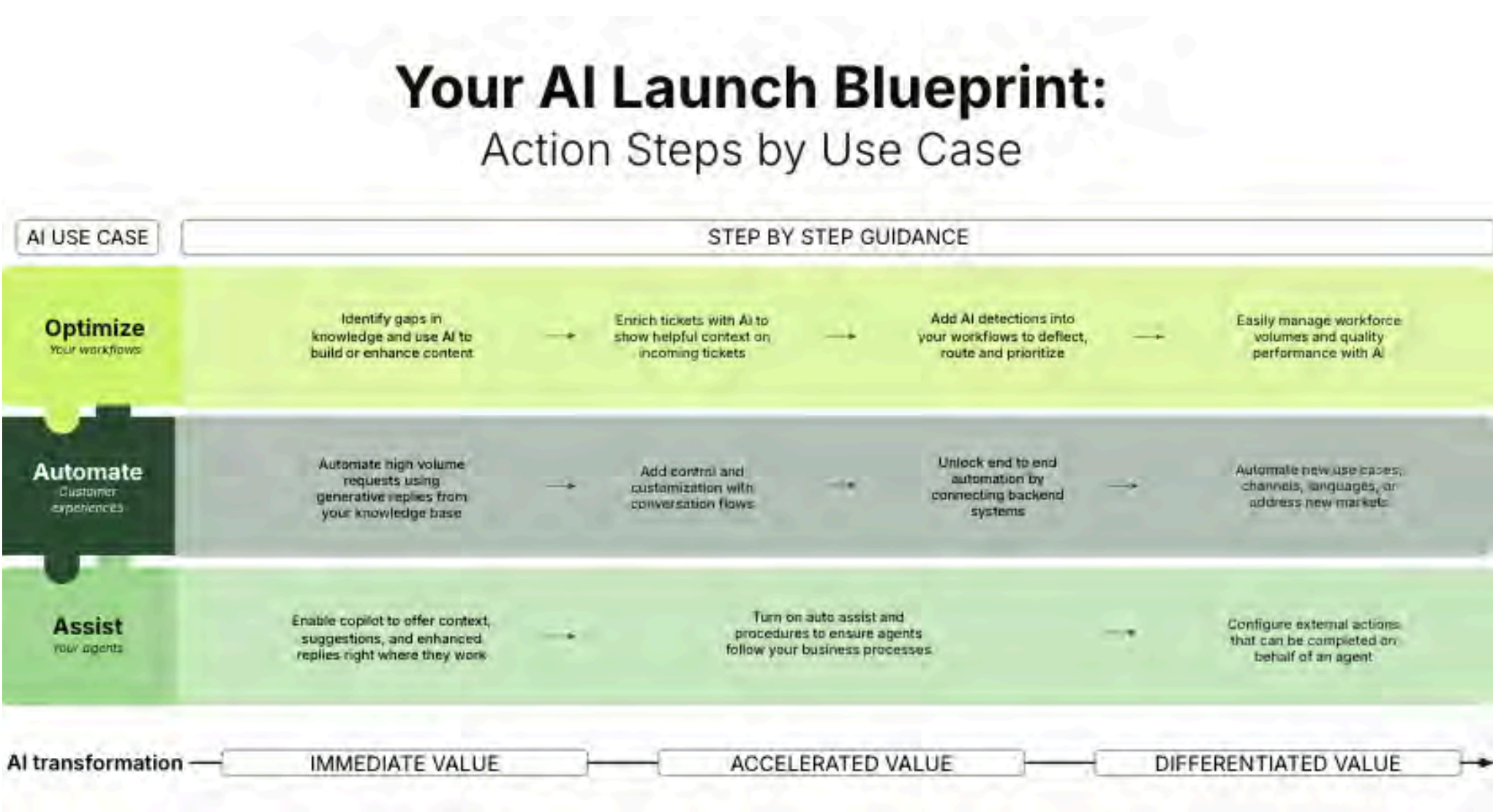
STEP 3



Build your actionable AI adoption plan

Your AI launch blueprint is your concrete plan to drive value at every stage of your adoption journey. It will help you both see immediate value—and differentiate your business and the experiences you provide at scale. Whether you plan to optimize, automate, or assist, we have a plan to guide your launch:

Now, identify your use case and sketch out your next steps.



STEP 4

Get ready to launch

Now that you've identified your use case and built your adoption plan, you're one step closer to launching. But before you launch, it's critical to (1) understand your baseline and needs, and (2) prepare your business for change.

Review the below considerations and jot down your immediate next steps:



Pro tip: Identify agent subject matter experts (SMEs) who can help pilot and promote your adoption plan.

1· Understand your baseline and needs

Data and metrics

Acknowledge where you are today and where you want to be in terms of results.

Team structure

Structure your team based on their skills and needs to optimize performance.

Customer experience

Consider the steps required to drive an ideal customer experience with your business.

2· Prepare your business for change

View AI as a partner

Instill the belief that AI exists to help agents and clearly communicate the benefits that they can expect.

Build trust

Ensure agents know what to do and what's expected of them. This means designing the right training and testing so both you and your agents can realize the benefits of AI and avoid some of the pitfalls.

Communicate

A strong communication plan is key in driving usage and deeper adoption of what you are rolling out.

Continuously improve

AI is not something you set and forget. It's important you develop a process where you regularly refine your operations to continuously improve.



NOTES

Use this space to jot down thoughts, questions, next steps, or anything else you'd like.

