

8 steps to create a winning AI proposal

Use this worksheet to get started on your benefits team’s proposal for your AI committee.



You’ve done the work. You’ve taken a close look at your benefits team, analyzed the activities it performs, and identified [the first problem you want to solve with artificial intelligence \(AI\)](#).

Now, you need to get the rest of your organization on board. Whether it’s creating a benefits chatbot for employees or implementing a tool to give you deeper insights into benefits utilization, you’ll want to craft a thorough and winning proposal for key leaders of your organization. Frequently, you’ll be working with an internal [AI committee](#) to get your ideas implemented—that means discussing your plans with company leaders in IT and technology, legal and compliance, finance, and the C-Suite.

Not sure where to start? In this worksheet, we’ll run through the questions you may want to consider and the details you can discuss with your AI committee or other organizational leaders.

When you’re done, you may be able to submit a stellar benefits AI proposal and have a productive, meaningful conversation with everyone involved.

Step	Questions / considerations	Your answer
<p>1. Designate a requestor, executive sponsor, and owner for the project.</p>	<ul style="list-style-type: none"> • The requestor can present and answer questions about the proposal. • The executive sponsor can be responsible for the use case at an executive level. • The owner can implement and manage the AI system or tool. 	
<p>2. Describe the project and define the AI use case.</p>	<ul style="list-style-type: none"> • What problem are you solving with this project? • Who is the main use audience for the proposed tool? • Will it be used internally or externally? 	

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3. Outline the benefits of the project.	<ul style="list-style-type: none"> • How does the project align with the strategic goals of the company? • Which audiences will benefit and how? 	
4. Answer any questions about risk.	<ul style="list-style-type: none"> • Will the project make automated decisions on behalf of users? • Will it interface with external business audiences, or produce content used to communicate with them? • Will the project generate material we consider to be our intellectual property? • Will it affect company financial outcomes, like compensation or tax? • Could the tool have any large-scale negative impact on our audiences, community, or social institutions? 	
5. Address data protection specifically.	<ul style="list-style-type: none"> • Will the project use employee or customer data? • If data is used, will measures be implemented to protect it? 	
6. Speak to the technology solution you anticipate.	<ul style="list-style-type: none"> • Do you have an AI tool or technology in mind? Is it new to the organization? • Do you need assistance in selecting or building the right solution? • Will a contract or license agreement be needed? 	
7. Outline plans for human oversight.	<ul style="list-style-type: none"> • What role will humans play in reviewing or validating the AI tool's output? 	
8. Define how you'll measure success.	<ul style="list-style-type: none"> • How will you know the AI tool is meeting expectations? • How will you ensure all necessary team members have the skills and knowledge needed to use and assess the tool? 	