

AI IMPLEMENTATION PLAYBOOK

TURNING INSIGHTS INTO ACTION

INTRODUCTION

THE AI LANDSCAPE IN 2025



When Daniela Amodei co-founded Anthropic, she faced a challenge that's increasingly prevalent in the AI industry in 2025: how to harness AI's transformative potential while building systems businesses can trust.

Anthropic's decision wasn't just about ethics – it was about creating AI systems enterprises could confidently deploy at scale. As AI becomes more powerful (and more pervasive), this approach is proving prescient: Companies that thoughtfully implement AI are seeing it act as a profound force multiplier across their business.



"We use constitutional AI, which are guardrails we bake into our tech from Day 1."

DANIELA AMODEI
PRESIDENT AND CO-FOUNDER
ANTHROPIC

Conventional Silicon Valley wisdom is to move fast and fix things later – but at Dreamforce, Daniela and 115+ leaders showed us how being intentional about AI implementation means moving strategically in order to harness AI's competitive advantages.

The timing of this message couldn't be more critical: According to McKinsey, [92% of companies plan to increase their AI investments over the next 3 years](#). This surge presents both opportunity and urgency – the companies that implement AI effectively today will have a significant edge tomorrow.

This AI Implementation Playbook aims to separate signal from noise. Drawing from core Dreamforce sessions featuring our portfolio companies, it offers a roadmap for implementing AI into your business in a way that sets you up for success.

Whether you're dipping your toes or diving headfirst into the deep end, this playbook offers actionable insights from those who've taken the leap into an AI-driven future.

Fair warning: AI isn't a "plug and play" solution. But the opportunity cost of waiting to implement grows by the day. So for those ready to roll up their sleeves and reimagine their business through the lens of AI, it's time to turn inspiration into action.

Let's get started.

1

ASSESSING YOUR AI READINESS

Is your organization truly prepared for AI adoption?

2

BUILDING YOUR AI STRATEGY

Identifying opportunities and selecting the right tools.

3

IMPLEMENTING AI

From pilot projects to company-wide transformation.

4

ADVANCED AI IMPLEMENTATION

Pushing beyond basic use cases.

5

OVERCOMING AI IMPLEMENTATION CHALLENGES

Sidestepping pitfalls and fostering an AI-ready culture.



1

ASSESSING YOUR AI READINESS

Let's be honest, not every company is ready to implement AI. If you still use a fax machine for your day-to-day communication, for example, there might be a few systems to optimize before going all-in on machine learning.

But how do you know if your company, systems, and employees are ready for AI?

Before diving into specific implementation strategies, it's crucial to understand where your organization stands in its AI journey. This assessment will help you identify your strengths and areas for improvement across key dimensions of AI readiness.

Take the AI Readiness Self-Assessment

Before you start shopping around for AI tools, take our **AI Readiness Self-Assessment** and get the unfiltered, honest answer: Can your organization handle the (positive) change that comes with implementing AI?

For each question, identify the benchmark that best describes your company's situation and assign yourself the corresponding point rating. At the end of the assessment, add up all your points to determine your AI Readiness Score.



1. Not Started

No action taken or in very early planning stages.

2. Early Stage

Initial steps taken, but significant work remains.

3. Developing

Clear progress made, but needs to be fully implemented or optimized.

4. Advanced

Well-developed capabilities with some room for improvement.

5. Leading

Best-in-class capabilities, serving as an industry benchmark.

1. FOUNDATIONAL READINESS

Our product roadmap incorporates AI/ML features that address specific customer pain points.

Rating:

Benchmarks

- 1 No AI features planned
- 2 Discussing potential AI features, but no concrete plans
- 3 Some AI features identified, but not yet implemented
- 4 AI features in development for key products
- 5 AI is core to our product, with continuous innovation based on customer feedback

Benchmarks

- 1 We haven't considered how AI could differentiate our product
- 2 We have a general idea of AI's potential but haven't mapped it to specific competitive advantages
- 3 We've identified some ways AI could differentiate us, but haven't fully validated these ideas
- 4 We've identified key AI-driven differentiators and are actively developing them
- 5 Our AI capabilities are a primary differentiator, consistently setting us apart from competitors

We clearly understand how AI can differentiate our product in the market.

Rating:



We have a strategy for acquiring or generating the data needed to train our AI models.

Rating:



Our data handling practices comply with industry standards and regulations (e.g., GDPR, CCPA).

Rating:

Benchmarks

- 1 We have no data strategy for AI
- 2 We've started collecting relevant data but don't have a comprehensive strategy yet
- 3 We have a data strategy, but it's not fully implemented or doesn't cover all our AI needs
- 4 We have a robust data collection strategy in place and are actively gathering and organizing data
- 5 Our data strategy is comprehensive, future-proof, and includes ongoing data enrichment and validation

Benchmarks

- 1 We're not aware of or haven't addressed data compliance regulations
- 2 We're aware of regulations but haven't fully implemented compliant practices
- 3 We've implemented basic compliance measures, but may have gaps in our practices
- 4 Our data practices are compliant, and we regularly audit for adherence to regulations
- 5 We have a comprehensive data governance framework ensuring full compliance and transparency, often exceeding regulatory requirements



2. OPERATIONAL READINESS

We have the necessary AI/ML talent on our team or have a plan to acquire it.

Rating:

Our technical team can effectively integrate AI capabilities into our existing product architecture.

Rating:

Benchmarks

- 1 We have no AI/ML expertise on our team and no plans to acquire it
- 2 We have a few team members with basic AI knowledge but lack specialized expertise
- 3 We have some AI capabilities, but key skill gaps remain
- 4 We have a dedicated AI team with diverse skills, but still need to fill some specialized roles
- 5 We have a world-class AI team covering all necessary specialties and a robust talent pipeline

Benchmarks

- 1 We have no capability to integrate AI into our product
- 2 We've done some initial AI integrations but face challenges with more complex implementations
- 3 We can integrate basic AI features, but struggle with more advanced capabilities
- 4 We can seamlessly integrate AI into most of our products, with established best practices
- 5 AI integration is a core competency, with our architecture designed to easily accommodate and leverage AI capabilities



We have an efficient process for developing, testing, and deploying AI models.

Rating:



Our product can easily accommodate updates to AI models without disrupting user experience.

Rating:

Benchmarks

- 1 We have no defined process for AI development
- 2 We have a basic process in place, but it's not standardized or optimized
- 3 We have a defined process, but it's not fully efficient or automated
- 4 We have a well-defined, mostly automated process for AI development and deployment
- 5 We have a state-of-the-art, fully automated CI/CD pipeline for AI model development, testing, and deployment

Benchmarks

- 1 Updating AI models would require significant downtime and disrupt user experience
- 2 We can update AI models, but it often requires downtime or causes temporary issues
- 3 We can update models with minimal disruption, but the process is manual and time-consuming
- 4 We can seamlessly update AI models with minimal disruption, but the process isn't fully automated
- 5 Our product architecture allows for real-time AI model updates with zero perceived disruption to users



We have established ethical guidelines for AI development and use in our products.

Rating:

Benchmarks

- 1 We have not considered ethical implications of our AI use
- 2 We've discussed AI ethics but haven't formalized guidelines yet
- 3 We have basic ethical guidelines in place, but they're not comprehensive
- 4 We have comprehensive AI ethics guidelines that are regularly reviewed and updated
- 5 We have industry-leading AI ethics practices, including external audits and public transparency reports

We can explain our AI's decision-making process to customers when necessary.

Rating:

Benchmarks

- 1 We don't have any AI in place or our AI is a complete "black box" and we can't explain its decisions
- 2 We have a basic understanding of our AI's decisions but struggle to explain complex cases
- 3 We can explain most AI decisions, but lack tools to make this process efficient
- 4 We can provide detailed explanations for most AI decisions, with some exceptions for very complex scenarios
- 5 We have full AI explainability, with tools and processes to provide clear, comprehensive explanations for all AI decisions

3. TRANSFORMATIONAL READINESS

Our pricing strategy accounts for the value added by AI features in our product.

Rating:

We have identified potential new revenue streams enabled by AI capabilities.

Rating:

Benchmarks

- 1 AI is not considered in our pricing strategy
- 2 We've considered AI in pricing discussions but haven't implemented specific pricing strategies
- 3 We have a basic premium for AI features, but it's not optimized or value-based
- 4 Our pricing model incorporates AI value, but we're still optimizing based on market feedback
- 5 We have a sophisticated, value-based pricing model that fully captures and communicates the value of our AI capabilities

Benchmarks

- 1 We haven't considered how AI could create new revenue streams
- 2 We've brainstormed potential AI-driven revenue streams but haven't validated them
- 3 We've identified some AI-enabled revenue streams and are in early exploration phases
- 4 We're actively developing multiple AI-enabled revenue streams, with some in early stages of implementation
- 5 We have successfully launched multiple new revenue streams powered by AI, significantly impacting our bottom line

Our marketing effectively communicates the value of our AI capabilities to potential customers.

Rating:



We have a strategy to educate customers and new hires on how to best use, discuss, and benefit from our AI features.

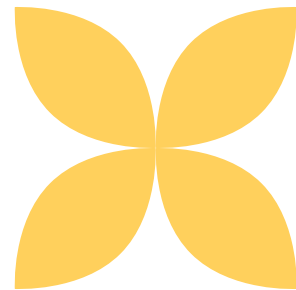
Rating:

Benchmarks

- 1 Our marketing doesn't mention our AI capabilities
- 2 We mention AI in our marketing but struggle to articulate its specific benefits
- 3 Our marketing highlights AI features, but the value proposition isn't clearly communicated
- 4 Our marketing clearly communicates AI benefits, but we're still refining our messaging for different segments
- 5 Our marketing strategy effectively demonstrates our AI value proposition, positioning us as an industry leader

Benchmarks

- 1 We have no strategy for educating about our AI features
- 2 We provide basic AI feature documentation but lack a comprehensive education strategy
- 3 We have some training materials, but they're not consistently used or updated
- 4 We have a well-developed AI education program for customers and employees, but it's not yet fully integrated into our onboarding processes
- 5 We have a comprehensive, continually updated AI education strategy that's fully integrated into our customer and employee onboarding and ongoing development



Our AI infrastructure can scale to meet growing customer demand and data volumes.

Rating:

Benchmarks

- 1 Our current infrastructure cannot handle AI workloads
- 2 Our AI infrastructure can handle current demand but would struggle with significant growth
- 3 We have some scalability, but significant upgrades would be needed for major growth
- 4 We have a scalable AI infrastructure that can handle substantial growth, but it's not yet fully optimized for cost-efficiency
- 5 Our AI infrastructure is highly scalable and optimized, designed to handle exponential growth efficiently

We actively monitor and plan for emerging AI technologies that could impact our market.

Rating:

Benchmarks

- 1 We don't monitor AI trends or developments
- 2 We keep an eye on major AI trends but don't have a systematic approach to monitoring and planning
- 3 We have a process for monitoring AI trends, but struggle to incorporate insights into our strategy
- 4 We have a dedicated team tracking AI developments and regularly updating our strategic plans, but we sometimes miss emerging niche technologies
- 5 We have a comprehensive system for monitoring, evaluating, and rapidly incorporating emerging AI technologies into our strategy and product roadmap

SCORING AND INTERPRETATION

Total your scores

Foundational Readiness: ____ / 20

Operational Readiness: ____ / 30

Transformational Readiness: ____ / 30

Overall Score: ____ / 80

Now that you've assessed your organization's AI readiness, you have a clear picture of your strengths and areas for improvement. That's the foundation upon which you'll construct your AI roadmap.

The gaps you've identified become opportunities for growth, while your strengths serve as pillars to support your AI initiatives.

As we dive into strategy building, keep your readiness score in mind. If you scored high, you're well-positioned to pursue more ambitious AI projects. If your score was lower, don't be discouraged – instead, use this knowledge to inform a strategy that addresses your weak points while leveraging your existing capabilities.

Interpretation

65–80

High AI Readiness

Your startup is well-positioned to leverage AI for competitive advantage.

49–64

Moderate AI Readiness

You have a good foundation, but need to address some key areas to fully capitalize on AI.

33–48

Developing AI Readiness

Significant work is needed to prepare your startup for AI-driven growth.

Below 33

Low AI Readiness

Consider prioritizing AI readiness as a core strategic initiative.

Start With a Data Audit

Data silos are prohibitive to AI innovation.



"Your data has to be in one place for AI to work. There needs to be everything in one central view — otherwise, no actions can happen."

RACHIT KATARIA
FOUNDER OF CENTRALIZE

If your data is scattered across a dozen different systems, your AI efforts are going to sputter before they even start.

So, how do you fix it?

Start with a data audit. Get a clear picture of what you have and where it lives. Here's a quick checklist to get you started:

Identify all data sources

Go beyond the obvious. Include not just your CRM and ERP systems, but also things like IoT sensor data, email communications, and even voice recordings from customer calls.

Catalog data types and formats

Be specific. Instead of just "customer data," break it down into categories like demographic information, purchase history, support tickets, and website behavior.

Assess data quality and completeness

There are plenty of tools that can help you do this super efficiently. We're proud to support innovative companies making data management more efficient and reliable:

- [Astronomer](#) streamlines workflow orchestration and data pipeline automation
- [Alation](#) enables robust data cataloging and governance
- [Atlan](#) facilitates collaborative data discovery and documentation
- [Airbyte](#) simplifies data integration and ETL processes
- [Databricks](#) delivers unified analytics and data processing

Map data flows and dependencies

Understanding how data moves through your organization is critical. We're proud to back companies addressing this challenge:

- [dbt Labs](#) for transforming data quality
- [Monte Carlo](#) for data reliability and observability
- [BigID](#) for advanced data discovery and classification

Next, break down those silos by implementing tools that create a single source of truth. Remember: The goal isn't just consolidation – it's creating a foundation for AI-ready data that's clean, accessible, and actionable.

Here are some powerful options to consider:

1. Salesforce MuleSoft

A leader in integration platform as a service (iPaaS), offering robust API management and enterprise-grade integration capabilities.

- **Best for:** Organizations looking for a comprehensive, scalable integration solution that works seamlessly with Salesforce and other enterprise systems.
- [Learn more](#)

2. Data Cloud

Integrates data from external sources into Salesforce in real-time without copying or storing the data.

- **Best for:** Organizations that need to access and use external data within Salesforce without data replication.
- [Get started](#)

Remember to evaluate these tools based on your specific needs, such as **the volume and variety of your data sources, your technical expertise, and your budget**. Many of these platforms offer free trials or demos, allowing you to test them before committing.

Don't stop at centralizing your data. Pay attention to its quality too. Clean, accurate data is the fuel that will power your AI engine – set up processes to regularly clean and update it.

Processes include:

- **Creating a data retention plan:** Limit the number of data extensions in your account and the amount of data you store.
- **Committing to data hygiene:** Remove data that is incorrect, incomplete, improperly formatted, or duplicated in your company's database of record.
- **Setting up data duplication rules:** Make sure no inputs are duplicated, throwing off your results.

2

BUILDING YOUR AI STRATEGY

You've assessed your AI readiness. You've got clean (or cleaner) data.

Now it's time to transform that foundation into a strategy that drives real business value.

At Dreamforce 2024, Vipul Ved Prakash, CEO of Together AI, highlighted an important shift based on their conversations with enterprise customers



"Last year, most large enterprises were asking what their generative AI strategy should be. More recently, it's changed. A large telco we met with recently had their data and benchmarks for an agentic system already organized. So it's becoming more tangible in terms of how to build and apply these systems in products."

VIPUL VED PRAKASH
CEO OF TOGETHER AI

Let's craft an AI game plan that goes beyond buzzwords and delivers tangible results.



1. CHOOSING THE RIGHT PILOT PROJECT

When implementing AI, you shouldn't try and boil the ocean. Instead, start with a small pilot project to prove value, and then build out from there. Sketch out your pilot using this canvas.

1

PROJECT OVERVIEW

What's the goal?

2

DATA REQUIREMENTS

What data do you need, and where will it come from?

3

AI MODEL SELECTION

Which model fits your needs?



4

SUCCESS METRICS

How will you measure success?

5

TIMELINE AND MILESTONES

What's your roadmap?

6

RESOURCE ALLOCATION

Who's on the team, and what's the budget?

7

RISK ASSESSMENT

What could go wrong, and how will you mitigate it?

When selecting your pilot, think Goldilocks – not too big, not too small, but just right. As Kate Jensen from Anthropic emphasized:



"We counsel customers to start with use cases where you feel really comfy and know what success looks like."

KATE JENSEN

HEAD OF SALES AND PARTNERSHIP, ANTHROPIC

AI Goldmines: Identifying High-Impact Opportunities

Start by taking a hard look at your business challenges, or enlist folks across your org to tell you their biggest challenges in the last 30–60 days:

WHERE are you struggling?

WHAT processes eat up too much time?

WHICH areas, if improved, could dramatically boost your bottom line?

Remember to set **realistic expectations**: Arielle Fidel from Together AI noted, "**If you move the needle by 3% during your initial pilot, you're doing well.**"

As you brainstorm, keep an eye out for the bite-size opportunities where AI could provide a small lift in process or improvement. Some possibilities:

- **Customer Support:** AI chatbots handling routine customer inquiries
- **Product:** AI analyzing user data to suggest new features
- **Ops:** AI optimizing inventory and logistics
- **Marketing/Sales:** AI personalizing content based on user inputs

Now that we've laid the groundwork for an internal AI strategy, and you've begun to get your data in order, it's time to pick your AI tools.

2. SELECTING YOUR AI APPROACH: BUILD, BUY, OR HYBRID

Choosing the right approach to AI implementation is crucial. This decision will impact not just your short-term AI projects, but your long-term AI strategy and capabilities.

Start by getting crystal clear on what you need. Ask yourself:

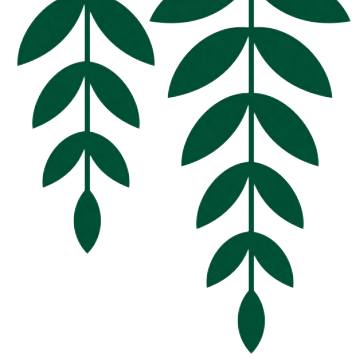
1. Are you looking for a general-purpose model or something industry-specific?
2. Do you need cloud-based flexibility or on-premises security?
3. How much customization will you require to drive value for your customers?
4. Can this AI solution scale with your business?
5. How does the AI model handle ethical considerations like bias and privacy?

Here are our pointers and recommendations:

In-House Development

This approach gives you maximum control and customization but requires significant upfront investment in talent and infrastructure.

- **Consider this if:** You have unique AI needs that off-the-shelf solutions can't meet, or if AI is central to your competitive advantage.
- **Example:** A hedge fund developing proprietary trading algorithms might choose this route to maintain their competitive edge.
- **Key consideration:** Be prepared for a longer development cycle and ongoing investment in AI talent retention and compute.



Off-the-Shelf Solutions

This option provides faster implementation and leverages proven technology but may offer less customization.

- **Consider this if:** You're looking to quickly implement AI for common use cases, or if you're just starting your AI journey.
- **Example:** A mid-sized e-commerce company might use a pre-built recommendation engine to enhance their product suggestions.
- **Key consideration:** Evaluate the flexibility of the solution. Can it be customized to your specific needs as your AI sophistication grows?

Hybrid Approach

This balanced approach lets you leverage existing solutions where appropriate while building custom capabilities where needed.

- **Consider this if:** You have a mix of common and unique AI needs, or if you want to gradually build in-house capabilities.
- **Example:** A healthcare provider might use off-the-shelf natural language processing for general document analysis, but develop custom models for specific medical imaging applications.
- **Key consideration:** Ensure you have a clear strategy for integrating and managing both in-house and third-party AI solutions.



3. SCALING AI ACROSS YOUR ORGANIZATION

Understanding the Scale-Up Challenge for Startups

Unlike large enterprises, you probably can't afford a full-fledged AI Center of Excellence. Instead, focus on building a lean, multifunctional AI team:

Technical Lead (Look for backgrounds in)

- a. Software engineers who've worked with machine learning frameworks
- b. Data scientists with production deployment experience
- c. Backend developers who've integrated AI APIs into applications
- d. DevOps engineers with ML operations experience
- e. Someone who has shipped AI features in your industry

Data Engineer (Look for backgrounds in)

- a. Experience building data pipelines at scale
- b. Background in distributed systems
- c. Familiarity with both SQL and NoSQL databases
- d. Track record of implementing data governance
- e. Experience with real-time data processing

Product Manager (Look for backgrounds in)

- a. Product managers from SaaS companies who've shipped AI features
- b. Business analysts who've worked on AI transformation projects
- c. UX researchers with experience in AI/ML products
- d. Domain experts who understand both technical and business requirements
- e. Former consultants with AI implementation experience

Pro tip

Look for people who can wear multiple hats. For example, a technical lead with product sense or a data engineer with MLOps experience can help you move faster with a smaller team.

1. Educate Leadership: Host AI literacy sessions. Bring in experts for lunch 'n' learns

AI isn't just for the engineering department anymore.

Consider implementing:

- Regular AI literacy sessions for all employees that teach them how to leverage AI tools to help them in their daily tasks.
- Specialized training for different departments (e.g., AI for marketing, AI for product development).
- An internal AI channel highlighting success stories, great prompt hacks, and new developments.

The goal isn't to turn everyone into an AI expert – it's about creating a shared language around AI that empowers all employees to contribute to and benefit from AI initiatives.

2. Select an AI Champion

Everyone in your organization can use AI.

Identifying and empowering AI champions within your organization can accelerate adoption. As the friendly face for your company's AI efforts, these enthusiasts can:

- Spread excitement about AI initiatives.
- Lead peer-to-peer training sessions.
- Act as a bridge between technical and non-technical teams.
- Communicate progress: Share your vision, progress, and setbacks.
- Address concerns head-on: Be upfront about potential AI-related impacts, including on jobs and how the company may evolve.



3

MEASURING AI IMPACT: LESSONS FROM ANTHROPIC

When Kate Jensen joined Anthropic as Head of Global Revenue, she determined how to measure the impact of a technology that transforms existing processes.

"We were dealing with a technology that could potentially transform entire business processes, not just improve a single KPI," Jensen recalls. This realization led her team to develop a multi-faceted approach to measuring AI's impact, one that goes beyond simple ROI calculations and embraces the transformative nature of AI.

1. EMBRACE IMPERFECT METRICS AS A STARTING POINT

It's hard to know the "right" way to measure AI, and the technology is so new that waiting for guidance can mean missing crucial insights and opportunities. Anthropic's team learned to start with imperfect but useful metrics, refining their approach as they gathered more data and insights.

For instance, when deploying Claude for customer service automation at companies like United Airlines and DoorDash, Anthropic initially focused on basic metrics like the number of customer service requests automated. However, they quickly realized that the impact of their technology went far beyond simple automation.

Action Item

Begin with readily available metrics, but be prepared to evolve your measurement approach.

Consider tracking:

- Number of tasks automated by AI (e.g., "200 customer inquiries handled by AI per day").
- Cumulative time saved on repetitive processes (e.g., "45 hours per week returned to team").
- Average resolution time reduction (e.g., "Customer issues resolved 40% faster month-over-month").
- Employee AI tool adoption rate (e.g., "75% of eligible employees actively using AI tools weekly").

Pro tip

Start by establishing a 30-day baseline for these metrics before implementing AI. This gives you a clear "before and after" comparison to demonstrate impact.



2. BLEND QUANTITATIVE DATA WITH RICH QUALITATIVE INSIGHTS

While hard numbers are crucial, Anthropic discovered that some of their most valuable insights came from qualitative feedback. This allowed them to uncover unexpected benefits and use cases for Claude that purely quantitative metrics might have missed.

Action Item

Implement a system to regularly collect and analyze qualitative data.

1. Conduct in-depth interviews with key users and stakeholders, like:

Workflow Impact Questions

- a. "Walk me through how AI has changed your daily workflow compared to three months ago."
- b. "What tasks do you now complete in minutes that used to take hours?"
- c. "Where do you still hit friction points when using AI tools?"

Value Discovery Questions

- d. "What's the most unexpected benefit you've found from using AI?"
- e. "Which features do you rely on most heavily and why?"
- f. "What would make you feel confident recommending this AI tool to colleagues?"

Future Needs Assessment

- g. "What problems do you wish AI could solve but currently can't?"
- h. "How do you envision AI supporting your role a year from now?"
- i. "What skills or training would help you better leverage AI tools?"

Pro tip

Schedule these interviews monthly with 3–5 power users and quarterly with a broader sample of employees. Record and transcribe the conversations to identify patterns and emerging needs that quantitative metrics might miss.

Document findings in a shared repository that product, engineering, and training teams can access to inform their roadmaps and priorities.

2. Analyze customer feedback and instances where they had a positive outcome:
 - a. Hold focus groups to explore new use cases and potential improvements.
 - b. Use AI-powered sentiment analysis on user feedback to identify trends. Tools like Brand24, Qualtrics, Sprout Social, and OpenText can be useful in uncovering insights.



3. DEVELOP A HOLISTIC SET OF KEY PERFORMANCE INDICATORS

Kate's experience at Anthropic helped her realize the need for a comprehensive set of KPIs that capture the multi-faceted impact of AI across all user segments:

Business Impact

Beyond revenue growth and cost savings, consider metrics like market share expansion, new market entry facilitated by AI, and AI-driven product innovations.

Operational Efficiency

Look at granular metrics such as reduction in error rates, improvement in decision-making speed, and enhanced forecast accuracy.

Customer Experience

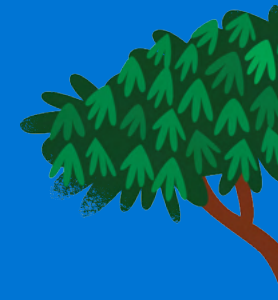
Go deeper than NPS scores. Measure changes in customer retention rates, lifetime value, and the complexity of issues AI can handle successfully.

Innovation Capacity

Track metrics like the number of new AI-enabled products or services, patents filed, and reduction in time-to-market for new offerings.

Scalability and Adaptability

Measure how well your AI solutions handle increased loads, adapt to new data, and extend to new use cases.



Action Item

Create a balanced scorecard for your AI initiatives that captures impacts across all these dimensions. Regularly review and adjust these metrics as your AI capabilities evolve.

4. IMPLEMENT A ROBUST CONTINUOUS IMPROVEMENT LOOP

AI isn't a "set it and forget it" technology. Anthropic's success with Claude comes from their commitment to continuous refinement based on real-world performance data.

Action Item

Establish a structured process for ongoing improvement the Anthropic way:

- Implement comprehensive monitoring systems that track both technical performance and business outcomes, such as Cisco Appdynamics Business iQ, Dynatrace, and DataDog.

- Conduct regular model audits to check for drift or bias using Amazon SageMaker Clarify, Whylabs.ai, and Prometheus + Grafana.
- Establish feedback loops with end-users and key stakeholders.
- Stay abreast of the latest AI research and industry trends by keeping up with newsletters, reading field publications, and participating in webinars, online conferences, and workshops.
- Regularly update your models and retrain on new data: Think monthly or quarterly.

Pro tip

Set up automated alerts for significant deviations in key metrics, but also schedule regular deep-dives to look for subtle trends or emerging issues.



5. FOSTER A CULTURE OF TRANSPARENCY AND SHARED LEARNING

At Dreamforce, Kate said she learned a valuable lesson about the importance of transparency in AI initiatives. Initially, she shielded her team from less-flattering metrics, thinking it would help morale.

"I thought I was protecting them, but I was actually hindering our progress," Kate said. By embracing full transparency, Anthropic fostered an environment of faster problem-solving and more innovative thinking for their business and customers.



Action Item

Create mechanisms for sharing AI performance data across your organization:

- Develop a central dashboard accessible to all team members using Airtable, Tableau, or Atlassian.
- Hold regular "AI Impact" meetings to discuss successes, challenges, and learnings.
- Encourage cross-functional teams to collaborate on AI initiatives – for example, price forecasting.
- Celebrate AI wins, but also create safe spaces to discuss and learn from setbacks.

6. LEVERAGE STRATEGIC PARTNERSHIPS TO ACCELERATE GROWTH AND LEARNING

Strategic partnerships can significantly accelerate your AI journey by providing expertise, resources, and real-world implementation experience. Together AI's collaboration with data providers, Runway's work with creative agencies, and Salesforce's integration with marketing platform Typeface all demonstrate how partnerships can drive AI innovation.



For Technology Partners

- Partner with cloud providers who offer AI-optimized infrastructure (like Together AI does with specialized GPU providers).
- Work with AI model providers who align with your specific use case (e.g., Claude for content generation, Runway for video).
- Look for partners offering enterprise-ready solutions with clear privacy and security controls.

For Implementation Partners

- Connect with systems integrators who have proven AI deployment experience.
- Partner with industry-specific consultants who understand your unique challenges.
- Join AI-focused industry consortiums to share implementation best practices.

Success Metrics to Track

- Time-to-value for AI implementations.
- Cost savings from shared resources.
- Number of successful use cases deployed.
- Employee adoption rates of AI tools.

For example, when Arcadia implemented their energy data platform, **they partnered with utility providers for data access, cloud providers for infrastructure, and industry experts for domain knowledge.** This ecosystem approach helped them scale from **10 to 350 enterprise customers.**

The key is finding partners who complement your internal capabilities and can help you navigate common AI implementation challenges while accelerating time to value.

THE BOTTOM LINE: AI MEASUREMENT AS A STRATEGIC IMPERATIVE

Measuring AI's impact is not just about justifying investments – it's about driving continuous improvement, uncovering new opportunities, and staying ahead in a rapidly evolving field.

As you implement and scale AI in your organization, constantly ask:

How is AI reshaping our core business processes and value proposition?

Where are the unexpected benefits or challenges emerging?

How can we use our AI measurement insights to drive our next wave of innovation?

By adopting a comprehensive, nuanced approach to AI measurement – one that embraces both quantitative and qualitative insights, fosters transparency, and adapts to the transformative nature of AI – you can turn your AI initiatives into powerful drivers of business value and competitive advantage.

4

ADVANCED AI IMPLEMENTATION: BEYOND THE BASICS

As AI technologies mature, companies are moving beyond basic implementations to more sophisticated, enterprise-wide AI strategies. This shift brings new challenges and opportunities.

Drawing insights from industry leaders and our own research, we'll explore advanced AI implementation techniques and strategies for overcoming common obstacles.

WORKFLOW AUTOMATION: BEYOND SIMPLE TASKS

Ce Zhang, CTO of Together AI, highlighted the potential for AI to optimize complex systems: **"We may discover new architectures, for instance, that are better at learning to reason, that are more efficient at learning from the data that we have."** Ce's inference points to AI's evolving capability to transform entire workflows, not just individual tasks.

Action Item

- Map out your organization's key workflows, identifying areas where AI can have the most significant impact.
- Start with a pilot workflow automation project that has clear cross-department impact.

- Develop clear metrics to measure the impact of workflow automation, including time saved, error reduction, and employee satisfaction.

For example, automate the customer support-to-engineering feedback loop:

- Use AI to analyze support tickets and categorize feature requests.
- Automatically generate and prioritize engineering tickets based on customer impact.
- Create summary reports for product teams highlighting key customer pain points.
- Track resolution times and customer satisfaction scores to measure impact.



Industry Insight

At Dreamforce, Together AI demonstrated how their AI acceleration cloud is enabling companies to deploy advanced models with significantly improved efficiency – an excellent example that showcases AI's potential to fundamentally transform how businesses operate at scale.

ETHICAL AI DEVELOPMENT: BUILDING TRUST FROM THE GROUND UP

Responsible AI development is crucial. So how can you create a framework and implement it from the outset?

Action Item

- Establish an AI ethics board that includes diverse perspectives from within and outside your organization.
- Develop a comprehensive AI ethics policy that covers data privacy, bias mitigation, and transparency.
- Implement regular ethical audits of your AI systems, including testing for unintended biases or consequences. You can use auditing frameworks including [The IIA's AI Auditing Framework](#), [NIST AI Risk Management Framework](#), and [ICO's AI Auditing Framework](#).

Baking in these considerations from the start can prevent costly backtracking and safeguard your company's reputation. As Dr. Sasha Luccioni, AI and Climate Lead of Hugging Face noted, "Focusing on these problems today means tomorrow's issues will be less drastic."

Consider open-sourcing your AI ethics guidelines. This can build trust with customers and position your company as a thought leader in responsible AI.

CREATIVE AI APPLICATIONS: UNLOCKING NEW POSSIBILITIES

AI never stops developing, and your creativity should develop along with it. Cristóbal Valenzuela, Co-founder and CEO of Runway, said his AI-powered video generation tools feel "like going to the gym but for your creative mind. You're exercising your brain just for the sake of it feeling good." Here are some steps your organization can take to layer AI into the creative process:

Action Item

- Start with a focused two-week pilot: Select one creative workflow (e.g., content creation, design mockups, or code generation) and test an AI tool like Claude or Runway's Gen-3 Alpha. Document efficiency gains and quality improvements.
- Create an AI experimentation framework, or Slack channel for prompts, finds, and other tips. Over time, you can build a shared knowledge base of prompts and best practices.
- Schedule monthly show-and-tells where teams demo their AI discoveries.

A great example?

GitLab, an early adopter of Anthropic's Claude, uses the LLM for a wide range of creative tasks, from content creation to proposal automation.

GitLab Duo Code Suggestions lets users create algorithms or code blocks directly within the developer's integrated development environment. As a user types, it populates suggestions; and can generate code too.

With specific instructions, Code Suggestions can create code that even the developer is unfamiliar with: For example, Code Suggestions was able to generate a Tornado Web Server.

GitLab chose to partner with Claude because it noticed any off-track behavior and consistently generated accurate code.

In summary:

- GitLab started with specific use cases like proposal automation.
- They built clear evaluation criteria (accuracy and adherence to guidelines).
- They created structured workflows – for example, their Duo Code Suggestions provides real-time AI assistance within developers' existing tools.
- GitLab documented clear wins: The system can now generate complex code like Tornado Web Servers, even when developers aren't familiar with the framework.

The key to creative AI usage is to start small, measure results, and gradually expand successful applications across your organization.



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**STAYING AHEAD OF
THE AI CURVE**

The rapid evolution of AI technologies means that staying current is not just beneficial – it's essential. [As our research shows](#), AI adoption is accelerating across industries:

65%

of generative AI users are Millennials or Gen Z, and 72% of users are full-time employees.

70%

of Gen Z report using AI technology, with 52% trusting it to help make informed decisions.

52%

of users report increased AI usage since they first started using AI tools.



To maintain a competitive edge, organizations and individuals must commit to ongoing learning and adaptation. Here are several strategies to stay ahead:

1. LEVERAGE FREE AI TRAINING PROGRAMS

Salesforce is leading the charge in addressing the global AI skills gap with a [\\$50 million investment in free AI training through 2025](#). This initiative includes:

In-person training spaces in San Francisco, Chicago, Tokyo, Sydney, and other locales.

A pop-up AI Center for hands-on learning at Salesforce's San Francisco headquarters.

Comprehensive curriculum covering AI fundamentals, ethical AI use, and prompt engineering.

Since June 2023, learners have earned over 2.6 million AI and data badges through the Salesforce program. This level of engagement underscores the demand for AI education and the value of such educational initiatives.

2. ENGAGE WITH EXPERT CONTENT

Staying informed about AI innovations is crucial. Consider these options:



Podcasts

Subscribe to AI-focused podcasts like ["AI in Business" by Daniel Faggella](#) or ["Machine Learning Street Talk."](#) For Salesforce-specific insights, check out ["Ask More of AI"](#) on Salesforce+, featuring industry experts and Salesforce's AI innovators, as well as founders from the Salesforce Ventures AI portfolio.



Webinars and Virtual Events

Attend online sessions like [Google's "AI for Social Good"](#) webinar series or [Microsoft's "AI for Accessibility" events](#). Don't miss Salesforce's virtual AI summits and webinars, which often showcase [Agentforce](#) and the latest Salesforce AI innovations.



Industry Publications

Follow reputable AI and tech publications like ["MIT Technology Review"](#) or ["AI Trends"](#). Also, explore [Salesforce's Trailhead platform](#) for free, self-paced AI learning modules covering everything from AI basics to advanced implementation strategies.

3. EXPAND YOUR NETWORK

Networking remains a powerful tool for staying ahead in AI:

Virtual Networking

- Participate in AI-focused subreddits like [r/MachineLearning](#) or [r/artificial](#).
- Attend virtual conferences like [NVIDIA's GTC \(GPU Technology Conference\)](#) or [IBM Think](#). Don't forget [Salesforce's virtual Dreamforce sessions](#), which feature AI talks with major players in the industry.

In-Person Networking

- Attend conferences like [NeurIPS](#) or [ICML](#) to meet AI researchers and practitioners. AgentForce World Tour events and the Salesforce Dreamforce conference also offer great opportunities to connect with AI professionals and Salesforce experts.

- Set up coffee chats with local AI professionals through platforms like Meetup or local tech incubators. You can also join local [Salesforce User Groups that often feature AI-focused meetups](#).
- Organize or join AI-focused meetups in your area, such as "New York Machine Learning" or "[Silicon Valley AI](#)." Participate in Salesforce-sponsored hackathons and AI challenges to connect with like-minded innovators.

Remember, face-to-face interactions, whether at general AI events or Salesforce-specific gatherings, can be invaluable for building meaningful professional relationships in the AI field.

YOUR AI ACTION PLAN: 10 STEPS FOR SUCCESS

As we've explored throughout this playbook, successful AI implementation requires a multifaceted approach.

Here's a concise summary of key actions to propel your organization forward:

1

Assess Your AI Readiness

Conduct a thorough evaluation of your data infrastructure, technical expertise, and organizational culture. Use our AI Readiness Self-Assessment tool to identify areas for improvement.

2

Develop a Clear AI Strategy

Define specific, measurable goals for AI adoption. Identify high-impact opportunities within your organization where AI can drive significant value.

3

Start Small, Scale Smart

Begin with a pilot project that has high visibility but low risk. Use this project to demonstrate value quickly and build internal buy-in.

4

Prioritize Data Quality

Ensure your data is clean, organized, and accessible. Remember Rachit Kataria's advice: "Your data has to be in one place for AI to work."

5

Build an AI-Ready Culture

Invest in upskilling your workforce. Develop AI literacy programs for all employees and more intensive training for key roles.





6

Address Ethical Considerations

Develop an AI ethics framework early in your implementation process. Follow Daniela Amodei's approach of baking in "guardrails" from day one.

7

Measure and Iterate

Implement robust monitoring systems for your AI initiatives. Continuously refine your models based on real-world performance data.

8

Stay Informed

Allocate resources for ongoing learning about AI advancements. Attend industry events, engage with AI communities, and experiment with new technologies.

9

Foster Partnerships

Collaborate with AI startups, research institutions, or larger tech companies to access cutting-edge expertise and technologies.

10

Plan for the Long-Term

Develop a roadmap for scaling AI across your organization, considering both technical infrastructure and change management needs.





As you embark on this journey, keep in mind the words of industry expert Jayesh Govindarajan, EVP of Salesforce AI: "Embracing the innovator's dilemma is a key condition of adaptability."

In other words: Those who remain curious, flexible, and forward-thinking will be best equipped to lead the way into the future.

We hope you enjoyed our AI Implementation Playbook. Salesforce Ventures is a leading investor in the AI space. If you're an enterprising founder innovating in AI, we'd like to talk.

For more information about Salesforce Ventures, [visit our website](#).

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