

AI for PRODUCTIVITY STRATEGY SNAPSHOT



Identify where AI can realistically reduce friction, improve decisions, and give time back using the tools you already have. This snapshot supports Step 1 of InsITe's AI for Productivity roadmap.

WHERE PROGRESS FEELS FRAGILE

AI for productivity works best when it removes friction people already feel.

Which of the following most often slow work or add unnecessary effort?

Check all that apply:

- ☐ Repetitive or manual tasks
- ☐ Slow decisions or missed opportunities
- ☐ Information that is hard to find
- ☐ Limited visibility into production status
- ☐ Complicated or inconsistent processes
- ☐ Communication bottlenecks

Which one creates the most frustration or waste right now?

DEFINE SUCCESS

Before AI tools or automation, the first step is clarity. This section helps you define what productivity improvements would look like as a whole.

In the next 6-12 months, where would meaningful productivity improvement matter most?

Select up to three:

- ☐ Reducing time spent on low-value work
- ☐ Speeding up everyday tasks
- ☐ Improving focus and prioritization
- ☐ Reducing friction between teams
- ☐ Improving access to information
- ☐ Helping people feel more confident using technology

If these improved, what would be different in how work gets done across the organization?

WHERE ARE YOU TODAY

Answer based on your current reality, not intent or future plans. If outcomes require manual workarounds, extra effort, or individual heroics, select Needs Attention.

Rate each area:

Time spent on manual or repetitive work

- ☐ Needs Attention
- ☐ Somewhat Working
- ☐ Working Well

Confidence using existing tools effectively

- ☐ Needs Attention
- ☐ Somewhat Working
- ☐ Working Well

Ability to adopt new ways of working

- ☐ Needs Attention
- ☐ Somewhat Working
- ☐ Working Well

Ease of finding information needed to do work

- ☐ Needs Attention
- ☐ Somewhat Working
- ☐ Working Well

Consistency in how work gets done across teams

- ☐ Needs Attention
- ☐ Somewhat Working
- ☐ Working Well

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YOUR STRATEGY SNAPSHOT

Capture what matters most coming out of this exercise. This snapshot becomes a reference point for alignment, planning, and next steps.

What productivity success looks like for our organization:

Our biggest source of friction or wasted effort:

What feels risky to solve without guidance:

If we could improve one thing in the next 90 days, it would be:

WHAT THIS CREATES

By completing this Strategy Snapshot, you've taken a meaningful first step forward.

You now have:

- A shared definition of productivity success
- Visibility into where work feels heavier than it should
- Insight into where everyday AI could help first

This clarity is what allows you to move from intention to impact.

BEFORE YOU MOVE FORWARD, CHALLENGE YOURSELF

These questions are meant to create honest reflection. If these questions are difficult to answer, that's not a failure, it's a signal. And it's often the best place to start.

Clarity & Outcomes

- If you asked five leaders what "better productivity" means, would the answers match?
- Do we know which work is truly low-value vs. high-value or are we guessing?

Work Reality

- Where does work slow down because people can't find what they need?
- Which handoffs create the most rework and is the root cause missing information, unclear ownership, or inconsistent process?

Data, Access & Trust

- Do we trust our internal information enough to rely on AI outputs or would teams still double-check everything?
- Would we be comfortable if AI surfaced anything a user already has access to?

Adoption & Habits

- Are we building practical skills and use cases or assuming people will figure it out on their own?
- If we introduced AI tomorrow, would people actually use it?

WHAT COMES NEXT?

Turn insight into action with an **AI Strategy Workshop**.

An InsITe Advisor facilitates a business-first working session to:

- Pressure-test key priorities
- Identify high-impact starting points
- Align AI use cases to real workflows and goals

REACH OUT TODAY TO LEARN MORE.

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