

Preparing your AI presentation project for internal approval

Purpose of this checklist

Use this checklist to build the internal business case for an AI presentation tool. It covers the key questions from use case and business value through pilot planning, IT, data privacy, security, and governance.

What you will have at the end

When you complete the checklist, you will have a clear view of:

- What information is already available and what still needs to be clarified
- Which stakeholders need to be involved
- What is required before a pilot or rollout can be approved

Who should use it?

This checklist is designed for project leads and business owners in Communications, Marketing, Brand, Sales Enablement, Transformation, and other functions evaluating, piloting, or preparing an AI presentation tool for internal approval.

How to use the checklist

Mark each item as Open, In Progress, or Complete. The amount of detail required depends on the decision you are seeking. A pilot may only require a reasonable preliminary review based on vendor documentation, product information, or a demonstration. Before a broader rollout, however, the most important requirements should be validated under real working conditions.

1. Build the business case

Define the use case and current challenge

The use case and business problem are clearly defined.

We can explain which presentation workflow the tool is intended to improve and what current problem it should address. For example, significant manual effort, long production times, inconsistent quality, or weak brand consistency.

☐ Open ☐ In Progress ☐ Complete

The target user groups are defined.

We know which teams and roles will use the tool initially and approximately how large the potential user population could become.

☐ Open ☐ In Progress ☐ Complete

The scope is clearly defined.

We have determined which presentations, workflows, and content are included and, where relevant, what is specifically out of scope for the initial phase.

☐ Open ☐ In Progress ☐ Complete

Tip:

Focus on the business process you want to improve, not primarily on the technology. The more specific the use case, the easier it is for stakeholders to understand its business relevance.

Define measurable value and success

The expected business value is clearly described.

Examples include reduced presentation creation effort, faster content production, higher-quality output, stronger brand consistency, or lower dependence on external design resources. Whenever possible, connect these benefits to an existing workflow.

☐ Open ☐ In Progress ☐ Complete

Success criteria are defined.

Examples include:

- Time required per presentation
- User satisfaction
- Brand compliance
- Output quality
- User adoption
- External cost savings

☐ Open ☐ In Progress ☐ Complete

Relevant baseline metrics are documented whenever possible.

Examples include current production time, review and coordination effort, or spending on external design resources.

☐ Open ☐ In Progress ☐ Complete

Tip:

Capture one or two meaningful baseline metrics before the project begins. Without a baseline, demonstrating the tool's actual impact later becomes much more difficult.

Define the project scope and approval request

The decision being requested is clear.

For example proof of concept, pilot or full implementation

☐ Open ☐ In Progress ☐ Complete

The planned scope is defined.

This may include the number of users, participating teams, use cases, and planned duration.

☐ Open ☐ In Progress ☐ Complete

The approval request can be summarized in one sentence.

For example: "Approve a three-month pilot of an AI presentation solution for 30 users with a budget of EUR X."

☐ Open ☐ In Progress ☐ Complete

2. Assemble the internal approval package

Confirm that the following information is available in one place:

- Product and vendor overview
- Pricing, cost, and licensing information
- One-page summary of the proposed pilot or project
- Vendor security, data privacy, and relevant contractual documentation
- Information about data processing, hosting locations, retention, and subprocessors
- Sample workflow, product demo, or specific presentation use case
- Draft recommendation or decision document for management or the Steering Committee

☐ Open ☐ In Progress ☐ Complete

3. Confirm management readiness

Strategic alignment

The use case supports relevant business priorities.

Examples include productivity, cost efficiency, digital transformation, AI adoption, brand management, or scaling content production.

☐ Open ☐ In Progress ☐ Complete

Tip

Connect the use case directly to existing company priorities. This positions the initiative as a business project with measurable value rather than simply an interesting AI application.

Costs and resources

Expected costs are transparent.

Consider licensing and implementation costs as well as possible expenses for services, integrations, training, or enablement.

☐ Open ☐ In Progress ☐ Complete

Internal resource requirements are understood at a high level.

We know what support will be needed from the business team, IT, Data Privacy, Security, and other relevant functions.

☐ Open ☐ In Progress ☐ Complete

Pilot costs and potential rollout costs are evaluated separately.

This helps management understand both the investment being requested now and the potential financial impact of scaling the solution later.

☐ Open ☐ In Progress ☐ Complete

Tip:

Do not consider licensing costs alone. Include internal effort for implementation, testing, governance, enablement, administration, and ongoing support.





Timing and approvals

The timeline, key milestones, and dependencies are understood.

Examples include:

- IT review
- Contract execution
- Technical setup
- Pilot launch
- Budget cycles

☐ Open ☐ In Progress ☐ Complete

Required internal stakeholders and approval bodies have been identified and engaged.

Determine whether teams beyond IT, Data Privacy, and Security must participate. Depending on the organization and jurisdiction, this may include Legal, Procurement, a works council or other employee representative body, or an internal AI governance committee.

☐ Open ☐ In Progress ☐ Complete

Tip:

Plan for more than the desired go-live date. Include the time required for internal reviews, stakeholder consultation, approvals, contracting, and technical preparation.

Risks and ownership

Key risks and mitigation measures are defined.

Examples include AI-generated inaccuracies, brand compliance issues and increased review requirements. Possible controls may include a limited pilot, human review, approved templates, or restrictions on certain data and use cases.

☐ Open ☐ In Progress ☐ Complete

Business ownership and responsibilities are clear.

We know who owns the initiative and who is responsible for coordinating the pilot, measuring results, and preparing the next decision.

☐ Open ☐ In Progress ☐ Complete

Tip:

Not every risk needs to be eliminated before the project begins. The important point is to identify the key risks and ensure they can be tested, controlled, or managed appropriately.

4. Confirm IT, data privacy & security readiness

Data and AI use

Permitted and prohibited data types are defined.

We have determined what users may and may not enter into the tool, including internal company information, personal data and confidential or restricted information

☐ Open ☐ In Progress ☐ Complete

The vendor's handling of customer data is understood.

This includes:

- Data storage
- Retention
- Deletion
- Potential use of customer data for AI model training

☐ Open ☐ In Progress ☐ Complete

Hosting locations and relevant data privacy information are documented.

This may include data processing agreements, hosting regions, and information about subprocessors.

☐ Open ☐ In Progress ☐ Complete

Tip:

Determine early what data the tool is actually expected to process. This decision will affect many downstream privacy, security, compliance, and governance requirements

Security and access

Relevant vendor security and compliance documentation is available.

Examples include certifications, security documentation, and independent audit reports.

☐ Open ☐ In Progress ☐ Complete

Authentication, user roles, and administrative access are understood.

This may include single sign-on, user provisioning, role management and administrator permissions

☐ Open ☐ In Progress ☐ Complete

User access management is defined.

There is a clear process for creating, updating, and removing user accounts and permissions.

☐ Open ☐ In Progress ☐ Complete

Technical Integration and Operations

IT can estimate the technical effort required.

Required integrations, SSO configuration, administrator roles, and technical testing for the pilot or rollout have been identified.

☐ Open ☐ In Progress ☐ Complete

Administration, support, and escalation processes are defined.

It is clear who owns the solution internally and what support and escalation options the vendor provides.

☐ Open ☐ In Progress ☐ Complete

Tip:

Separate pilot requirements from full rollout requirements. Not every production-level integration needs to be completed before a controlled pilot can begin.



5. Validate presentation quality, brand & governance

Corporate design standards and key brand assets can be implemented and managed.

Examples include colors, fonts, layouts, logos and approved templates.

☐ Open ☐ In Progress ☐ Complete

Generated presentations can be integrated into existing workflows and edited as needed.

For example, presentations can be exported to PowerPoint and individual elements can be modified.

☐ Open ☐ In Progress ☐ Complete

An appropriate review process exists for AI-generated content.

This is especially important for factual statements, numbers and statistics, marketing claims and content intended for internal or external publication

☐ Open ☐ In Progress ☐ Complete

Image, asset, and usage rights have been addressed at an appropriate level.

☐ Open ☐ In Progress ☐ Complete

Tip:

Evaluate these requirements according to the decision being made. Before approving a pilot, vendor demonstrations, product documentation, and sample outputs may provide enough information for an initial assessment. Use the pilot to validate brand compliance, output quality, PowerPoint editability, and day-to-day usability under real-world conditions.

6. Define the pilot

Pilot objective and assumptions to validate

What should the pilot demonstrate or test? Examples include brand compliance, output quality, PowerPoint editability, time savings, or user adoption.

Users and teams

Who will test the solution?

Use cases

Which types of presentations will be tested?

Pilot period

Success criteria

Which two or three quantitative or qualitative measures will determine whether the pilot is successful?

Owners

Criteria for scaling

What conditions must be met before the solution can move to a broader rollout?

Decision after the pilot

- ☐ Roll out
- ☐ Adjust and test again
- ☐ Extend the pilot
- ☐ Do not proceed

Tip:

Before the pilot begins, define which assumptions need to be tested and what a successful result looks like. This turns the pilot into a credible basis for an investment decision rather than an informal product trial.

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