AI & SaaS Implementation Checklist

30-60-90 Day Plan

Executive checklist for launching AI and SaaS programs

Transforming complex implementations into predictable outcomes

---

Date: _____ Organization: _____ Program Lead: _____ Executive Sponsor: _____
(Program Lead: CSM, TAM, Implementation Manager, or Internal Project Lead)

How to Use This Framework

This checklist guides AI and SaaS implementations from foundation through scale. Each phase builds on the previous one with clear success criteria and sign-off gates.

What You'll Create:

- Success Plan (draft in Pre-Launch, finalize Phase 1, update quarterly)
- Stakeholder Map (Phase 1)
- Runbook Index (start Pre-Launch, expand continuously)
- Risk Log (initiate Pre-Launch, review each phase)
- Training Roster (Phase 1 onwards)
- KPI Dashboard (configure Pre-Launch, monitor continuously)
- Architecture Diagram (Pre-Launch)
- Data & Model Governance Documentation (Pre-Launch)

Timeline Flexibility: The 30-60-90 day framework is a guide, not a mandate. Small pilots may complete more quickly; enterprise deployments may take 120-180 days. Adjust based on scope, complexity, and organizational readiness.

Continuous Practices Throughout All Phases:

- **Change Management:** Model versioning, rollback procedures, policy reviews
- **Privacy by Design:** Data redaction, retention workflows, access audits
- **Security Touchpoints:** Secret rotation, privilege reviews, threat assessments
- **Knowledge Management:** Prompt libraries, approved examples, safe defaults

Pre-Launch Foundation

Setting the stage for predictable outcomes

☐ **Leadership Alignment**

- Executive sponsor and working team identified with documented roles and responsibilities
- Success metrics documented and approved by the executive sponsor and department heads

☐ **Security & Access Foundation**

- Single Sign-On (SSO) and Role-Based Access Control (RBAC) implemented
- Least privilege access configured and reviewed with documented justification for elevated permissions
- Comprehensive audit logging enabled

Security review completed by: _____ Date: _____

☐ **Technical Environment Readiness**

- Cloud accounts, VPC/VNet infrastructure validated
- Application platforms, Kubernetes, and GPU/CPU pools configured and tested
- Model endpoints and data pipelines are operational and tested with a synthetic workload

☐ **Data Governance Excellence**

- Data sources mapped and classified
- PII handling policies established and documented
- Data residency, retention, and encryption protocols confirmed
- Encryption tested for data at rest and in transit
- Secrets management framework deployed and tested

☐ **Observability & Insights**

- Telemetry dashboards configured for availability, latency, quality, and cost
- Baseline metrics captured for future comparison

☐ **Metrics Framework**

- Key performance indicators defined and aligned with business outcomes:
  - System Health: Availability and latency SLOs
  - Adoption Metrics: WAU/MAU, active projects, API utilization
  - Quality Indicators: Success rates, user satisfaction, task completion rates
  - Efficiency Gains: Time-to-resolution, hours saved, support ticket volume
  - Financial Performance: Cost per 1k calls, budget adherence, ROI tracking
- Baseline measurements captured for comparison
- Dashboard access configured for stakeholders
- Reporting cadence established (daily during pilot, weekly during scale, monthly steady-state)

☐ **Risk Management Framework**

- Runbook index created with initial incident response procedures
- Risk log initiated with identified risks and mitigation strategies
- Success Plan draft completed and aligned with business outcomes

☐ **Pre-Launch Sign-Off**

All items above are verified complete. Ready to proceed to Phase 1.

Technical Sponsor: _____ Date: _____

Executive Sponsor: _____ Date: _____

Phase 1: Time to First Value *(Days 1–30)*

Prove the concept works and build confidence with real users

Timeline adjusts based on pilot scope and organizational readiness

☐ **Governance Structure**

- Stakeholder map completed, identifying decision makers, influencers, and end users
- Weekly working sessions scheduled to resolve blockers and adjust scope based on pilot feedback
- Monthly executive reviews are established with a defined escalation path and response time commitments
- Communication plan documented for status updates and issue resolution

☐ **Pilot Program**

- Pilot scope defined: [NUMBER] users in [DEPARTMENT] working on [SPECIFIC USE CASE]
- Success criteria documented with measurable targets
- Rollback procedures documented and tested in a non-production environment
- Pilot deployed to production environment
- The pilot monitoring dashboard is active with a daily review cadence

☐ **AI Safety & Quality Controls**

- Model guardrails implemented and tested
- All prompts and responses logged with user attribution
- Content filtering active (PII redaction, inappropriate content blocking)
- Audit retention configured (minimum 90 days)
- Evaluation datasets established for quality testing

☐ **Cost Tracking Foundation**

- Resource tagging implemented for cost attribution
- Cost baseline established for pilot users
- Budget alerts configured
- Cost per interaction tracking enabled

☐ **Knowledge Transfer & Enablement**

- Administrator training completed for [NUMBER] team members
- End-user training delivered to the pilot group
- Power users identified: 2-3 per participating department, committed to peer support
- Office hours scheduled (recommend 2x per week during pilot)
- Quick start guide and FAQ published

☐ **Operational Readiness**

- Issue intake process established with severity classifications
- Incident response workflows documented and team trained
- Support channel created and monitored
- On-call rotation established (if applicable)

☐ **Phase 1 Success Criteria**

- Pilot achieved [X% reduction in time/cost] or [Y number of successful task completions] as defined in the Success Plan
- System availability met or exceeded [X%] uptime target
- User feedback collected with a satisfaction score of [X] or higher
- No critical security or compliance incidents
- Go/No-Go decision for Phase 2 made

☐ **Pilot Retrospective**

- Lessons learned documented with recommendations for Phase 2 rollout

☐ **Phase 1 Sign-Off**

Pilot results reviewed. Proceeding to broader rollout approved.

CSM/Program Lead: _____ Date: _____

Executive Sponsor: _____ Date: _____

Phase 2: Adoption Acceleration *(Days 31–60)*

Scale from pilot to production-ready system

☐ **Production Hardening**

- High availability configuration deployed and tested
- Failover procedures tested with documented Recovery Time Objective (RTO) and Recovery Point Objective (RPO)
- Backup systems verified with a successful restore test completed
- Monitoring alerts configured and tested
- Capacity planning completed with autoscaling mechanisms validated
- Load testing performed at expected peak usage

☐ Security & Compliance Maturity

- Comprehensive security posture review completed
- Threat modeling performed for all active use cases
- Key rotation procedures automated and tested
- Access certification process established with a quarterly review cadence
- Compliance audit completed (if required for your industry)
- Security scorecard published for leadership

  ☐ **Security cleared for expansion:** No critical or high-severity findings blocking broader rollout. Remediation plan documented and scheduled for any medium-severity findings

☐ Expanded Rollout

- Rollout plan approved with a phased approach by the department/team
- Target user count for Phase 2: [NUMBER] users across [NUMBER] departments
- Additional use cases identified and prioritized
- User onboarding process streamlined based on pilot feedback
- Self-service resources published (documentation, videos, troubleshooting guides)

☐ Knowledge Institutionalization

- Comprehensive training sessions delivered to an expanded user base
- FAQs updated based on pilot questions and issues
- Standard Operating Procedures (SOPs) documented and tested with frontline teams
- Runbooks expanded to cover common scenarios identified during pilot
- Internal knowledge base or wiki established

☐ Usage & Quality Monitoring

- Adoption metrics tracked: Weekly Active Users (WAU), Monthly Active Users (MAU), API calls, active sessions
- Baseline metrics from the pilot exceeded with documented growth patterns
- Task completion rates tracked and above [X%] target
- Error rates monitored and below [Y%] threshold
- User satisfaction surveys deployed with a score of [X] or higher
- Latency and performance SLOs are defined and monitored

☐ Financial Operations

- Per-team cost visibility established with regular reporting

- Cost per 1,000 API calls or per-user metrics tracked
- Budget vs. actual spending is reviewed weekly
- Anomaly detection alerts are tested and responding
- Cost optimization opportunities identified

☐ **Strategic Planning**

- Risk log reviewed and updated with mitigation owners assigned
- Expansion opportunities evaluated: additional departments, use cases, integrations
- Resource requirements for Phase 3 have been identified and budgeted
- Integration roadmap drafted and aligned with business priorities

☐ **Phase 2 Success Criteria**

- Production usage reached [X%] of the target user population
- System availability maintained at or above [X%] uptime
- Two use cases documented with quantified business impact (e.g., [X% time savings], [$Y cost reduction], [Z% quality improvement]) suitable for executive presentation or case study
- Cost per user/transaction within approved budget parameters
- No unresolved critical issues blocking expansion

Phase 2 Sign-Off

System proven at scale. Ready for organization-wide expansion.

CSM/Program Lead: _____ Date: _____

Technical Sponsor: _____ Date: _____

Executive Sponsor: _____ Date: _____

Phase 3: Scale & Strategic Expansion *(Days 61–90)*

From proven success to sustainable operations

Timeline varies by organization size and complexity. Enterprise deployments may extend to 120-180 days

☐ **Executive Business Review Preparation**

- ROI analysis completed with quantified business outcomes across all active use cases
- Cost savings, efficiency gains, and quality improvements documented with baseline comparisons
- User adoption metrics compiled showing growth trajectory
- Success stories collected from participating teams

- Executive presentation deck prepared with business impact narrative
- Next quarter's strategic plan will be drafted with resource requirements and budget

☐ Organization-Wide Expansion

- Expansion plan approved with timeline and milestones
- Target: [X%] of the organization actively using the system
- Additional departments onboarded with dedicated launch support
- Cross-functional use cases identified and piloted
- Integration roadmap executed: [LIST KEY INTEGRATIONS]
- Self-service onboarding is enabled for new users

☐ Operational Excellence

- Incident response playbook refined based on actual incidents
- Mean Time to Resolution (MTTR) is tracked and improving
- Support ticket volume and resolution rates monitored
- Proactive monitoring alerts tuned to reduce false positives
- Change management process established for updates and new features
- Service Level Agreements (SLAs) are defined and communicated

☐ Continuous Improvement

- Post-implementation review conducted with all stakeholders
- Lessons learned, documented, and shared
- Feature requests collected and prioritized in the product backlog
- Technical debt was identified, and a remediation plan was created
- Process improvements identified and owners assigned
- Feedback loops established for ongoing refinement

☐ Financial Sustainability

- Cost trends are analyzed with projections for the next quarter
- Cost optimization initiatives implemented (right-sizing, reserved capacity, etc.)
- Chargeback or cost allocation model finalized (if applicable)
- Budget for the next fiscal period submitted and approved
- ROI tracking dashboard published for leadership visibility

☐ Knowledge & Community Building

- Internal community of practice established (Slack channel, regular meetups, etc.)
- Power user network expanded across all participating departments
- Best practices guide published based on real usage patterns
- Advanced training offerings developed for specialized use cases
- Innovation pipeline created for experimental use cases

☐ Transition to Steady-State Operations

- Operational cadence established:
  - Weekly: Team check-ins and issue triage

- Monthly: Usage and health metrics review
  - Quarterly: Executive Business Review (QBR) with strategic planning
- Ownership and responsibilities transitioned from the implementation team to the operations team
- Runbook and documentation handoff completed
- The on-call and support model is sustainable for long-term operations

☐ Renewal & Expansion Planning

- Health score assessment: [GREEN/YELLOW/RED] with supporting evidence
- Value delivered documented against the initial business case
- Expansion opportunities identified: [NEW DEPARTMENTS/USE CASES/CAPABILITIES]
- Executive sponsorship confirmed for contract renewal
- Upsell or expansion proposal prepared (if applicable)

☐ Phase 3 Success Criteria

- Target adoption of [X%] achieved across the organization
- System uptime maintained at [X%] or higher for 30 consecutive days
- User satisfaction score of [X] or higher maintained
- ROI meets or exceeds initial projections by [X%]
- Next phase expansion committed with executive sponsorship and budget approval
- Renewal risk minimized with documented value realization and executive support

Phase 3 Sign-Off & Transition

Implementation complete. Transitioned to the operational excellence model.

Program Lead: _____ Date: _____

Technical Sponsor: _____ Date: _____

Executive Sponsor: _____ Date: _____

Operations Owner: _____ Date: _____

Adapt this framework to your organization's needs. What matters is consistent progress, not perfect adherence to timelines.