

# Trust Insights 5P Integration Checklist:

## Purpose

What is the goal? What is the problem you're trying to solve?

- Clear use case defined with specific objectives and success criteria
- Strategic alignment confirmed with business priorities and organizational goals
- Use case scope boundaries clearly documented and communicated
- Success metrics established with measurement methodologies and data sources
- Stakeholder alignment confirmed through formal review and approval
- Expected outcomes documented with quantitative and qualitative impacts
- Organizational awareness established through appropriate communications
- Value proposition clearly articulated to all stakeholders and affected teams

# Trust Insights 5P Integration Checklist:

## People

Who is involved, both internally and externally?

- [ ] Implementation champion identified with appropriate authority and commitment
- [ ] Executive sponsor engaged with defined responsibilities and visibility
- [ ] Project team assembled with necessary skills and capacity
- [ ] Training needs assessment completed for all affected roles
- [ ] Skills development plan created with learning objectives and resources
- [ ] Roles and responsibilities defined for implementation and ongoing operations
- [ ] Change management strategy established with communication plan and timeline
- [ ] User adoption approach developed with engagement incentives and monitoring
- [ ] Succession planning established for key implementation roles
- [ ] External resource requirements identified with procurement approach

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## Process

How will you approach this problem in a repeatable, scalable way?

- Existing workflows documented with current state process maps
- Future state processes designed with AI integration touchpoints
- Transition approach defined with phased implementation plan
- Testing protocol developed with acceptance criteria and validation methodology
- Data flow mapping completed from source systems to AI application
- Governance guidelines established for AI usage and decision authority
- Exception handling procedures defined for edge cases and anomalies
- Performance monitoring processes established with review cadence
- Continuous improvement methodology defined for ongoing optimization
- Documentation standards established for process changes and knowledge capture

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## Platform

What tools do you need to solve this problem?

- Technical requirements defined with specificity and validation methodology
- Integration points identified with existing systems and data flows
- Data migration plan created with transformation rules and validation approach
- Security review completed with compliance validation and risk assessment
- Infrastructure requirements confirmed with capacity planning and scaling considerations
- Technical dependencies identified with sequencing and prerequisite actions
- Vendor selection completed with contractual terms and service level agreements
- Implementation environment established with appropriate staging and testing capabilities
- Disaster recovery and business continuity plans updated to incorporate AI systems
- Technical support model defined for ongoing operations and issue resolution

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## Performance

How do you measure success?

- Baseline metrics captured for pre-implementation comparison
- Key performance indicators defined for technical and business outcomes
- Monitoring system established with automated alerting and reporting
- Reporting cadence defined with appropriate distribution and review protocols
- Success criteria established for implementation phases and overall initiative
- Optimization process outlined for continuous performance improvement
- ROI tracking methodology implemented with financial impact assessment
- User feedback mechanism established for experiential evaluation
- Executive dashboard developed for visibility into implementation progress
- Post-implementation review process defined with lessons learned methodology

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