

Before you invest in AI, ten honest questions to ask first.

AI is one of the most powerful tools available to businesses right now. It is also one of the most oversold. Before you commit budget, time, and organisational energy, these ten questions will help you separate genuine opportunity from expensive noise.

There are no right or wrong answers. The goal is clarity, for you, and for anyone advising you.

ABOUT THE AUTHOR

Damian Copeland is the founder of CXBridge. He has 27 years of experience building and transforming CX operations at scale, as founder and MD of ICR Speech Solutions, Group COO, and Chief Solutions and AI Officer. He is a Certified Chief AI Officer, ISO 42001 Lead Implementer, Lean Six Sigma Green Belt, and holds a PhD in Interaction Design. He advises on transformation and AI, honestly.

01 Do you know what problem you're actually trying to solve?

AI works best when it's solving a specific, well-defined problem. If the answer is 'we want to use AI' rather than 'we want to reduce manual processing time in our finance team by 40%', you're not ready yet. Start with the problem, not the technology.

Ask yourself: What would success look like in 12 months, expressed in business outcomes, not technology terms?

02 Is your data in good enough shape?

AI is only as good as the data it runs on. Poor data quality, siloed systems, inconsistent formats, and gaps in historical records are the most common reasons AI projects fail, and they're discovered after the investment, not before. A data audit before any AI commitment is not optional.

Ask yourself: Could we describe our data sources, their quality, and how they connect to each other, right now, without preparation?

03 Do your people understand what's coming?

AI adoption that happens to people rather than with them fails. Resistance, workarounds, and quiet non-compliance will undermine the best-designed solution. The most successful AI programmes invest as much in change management as in technology. Has your team been brought into the conversation?

Ask yourself: If we announced an AI initiative tomorrow, what would our people's honest reaction be?

04 Are your processes documented and understood?

You cannot automate or augment a process you don't understand. Before AI can help, the process needs to be mapped, agreed, and consistently followed. If the answer is 'it depends on who's doing it', fix the process first. AI will amplify inconsistency, not resolve it.

Ask yourself: Could a new starter follow our key processes from documentation alone, without asking anyone?

05 Have you calculated the real cost of doing nothing?

The case for AI investment is often made on upside alone. But the cost of not acting, continued manual overhead, slower decisions, competitive disadvantage, is equally real. Understanding both sides gives you a much more honest picture of whether and when to invest.

Ask yourself: What is this problem costing us today, in time, money, and opportunity?

06 Who owns this, really?

AI initiatives without clear executive ownership drift. Someone needs to be accountable for outcomes, not just for the project being delivered. That person needs the authority to make decisions, the time to be genuinely involved, and a real stake in whether it works.

Ask yourself: Who would we hold accountable if this initiative failed to deliver results?

07 Are you measuring the right things?

If you can't measure the problem today, you won't be able to prove AI solved it tomorrow. Baseline metrics, current processing time, error rates, customer satisfaction scores, cost per transaction, need to exist before any solution is deployed. Without them, you're flying blind.

Ask yourself: What numbers would we point to in 12 months to prove this worked?

08 Does your vendor offer the support you actually need?

A product demo tells you what the technology can do. It tells you nothing about what happens after you've signed. Ask what onboarding looks like, what ongoing support is included, and who you call when something goes wrong. The answer tells you whether you're buying a product or a partnership.

Ask yourself: After go-live, who supports us, and what does that cost?

09 What's your governance and risk position?

AI introduces new risks, data privacy, regulatory compliance, bias, and reputational exposure. ISO 42001 provides a governance framework, and the EU AI Act is already creating obligations for many organisations. Understanding your risk exposure before deployment is basic due diligence.

Ask yourself: Do we know which regulatory frameworks apply to our planned AI use, and are we compliant?

10 Is AI definitely the right answer?

Sometimes the honest answer is not yet, or not here. A process problem is a process problem. A people problem is a people problem. AI applied to an unresolved process or culture issue will make things faster and worse. The most valuable thing an advisor can tell you is when AI isn't the right move.

Ask yourself: Have we genuinely explored whether this problem could be solved more simply, at lower cost and risk, without AI?

Not sure where your business stands? That's exactly what a discovery call is for.

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