

# AI Roadmap Technical Validation Checklist

For AI strategy consultants validating one roadmap use case before the client funds implementation.

## Purpose

Strategy work creates direction. Technical validation protects that direction from avoidable implementation risk.

Use this checklist after a roadmap workshop, prioritization session, governance engagement, or executive strategy phase. The goal is to test one use case against reality before selling or funding a build.

## The validation question

Can this use case be implemented with the client's current systems, data, operating model, and risk tolerance?

If not, what must change first?

## 1. Use-case specificity

A valid technical check needs a specific use case.

Questions:

- Who is the user?
- What decision or workflow changes?
- What output does the AI system produce?
- How often does it run?
- Where does the output appear?
- Does a human approve, edit, or override the result?
- What would make the system wrong or unsafe?

Weak use case:

"Use AI to improve customer success."

Stronger use case:

"Draft a weekly risk summary for each enterprise account using product usage, support tickets, renewal date, and CSM notes, then route it to the CSM for review before Monday pipeline meeting."

## 2. Data readiness

Questions:

- Does the data exist?
- Is it complete enough?
- Is it fresh enough?
- Is it accessible through a reliable path?
- Does the data include enough history?
- Are definitions stable?
- Are there sensitive fields that require filtering or governance?

Common blockers:

- Data exists only in spreadsheets
- Notes are unstructured and inconsistent
- CRM fields are stale
- Product events are not joined to accounts
- Permissions block access
- Historical data is incomplete

### 3. Integration path

Questions:

- Where does the system read from?
- Where does the output go?
- Does the destination support API writes, webhook posts, dashboard embeds, or human review?
- What system records the decision or action?
- Is there a rollback path?
- What happens when an API call fails?

Common blockers:

- Output needs to update a system with poor API support
- Workflow spans multiple tools with conflicting identity models
- No owner exists for integration credentials
- The destination workflow is not standardized

### 4. Evaluation and quality control

Questions:

- What makes an output good?
- Who reviews the first 50 outputs?
- Which errors are tolerable?

- Which errors are unacceptable?
- How will the team measure false positives, false negatives, hallucinations, or bad routing?
- What feedback loop improves the system?

Common blockers:

- No labeled examples
- No owner for evaluation
- No agreed quality threshold
- Executive sponsor expects deterministic behavior from probabilistic tooling

## 5. Operating ownership

Questions:

- Who monitors the system?
- Who handles exceptions?
- Who approves changes?
- Who owns prompts, models, data logic, and integrations?
- Who receives alerts?
- How does the team pause or disable the workflow?

Common blockers:

- Strategy sponsor is not the operating owner
- Engineering does not have capacity
- Business team expects the consultant to maintain the system indefinitely
- Governance is discussed but not operationalized

## Validation outputs

A strong validation sprint should produce:

- Use-case definition
- Required data inventory
- Integration map
- Risk and blocker list
- Feasibility score
- First implementation path
- Recommendation to build, defer, or repair foundations first

## Decision rules

Build when:

- Data exists and is accessible
- The workflow is specific
- The output has a clear user
- Integration path is manageable
- Quality can be evaluated
- Operating owner exists

Defer when:

- The use case is broad or vague
- Data is missing or untrusted
- No team owns the workflow
- Governance concerns are unresolved
- The implementation path depends on foundation work

### NEXT STEP

## Bring one client scenario to a partner fit call.

20-min call. Bring the client situation, the technical question, and the decision that needs to happen next. Leave with a written go/no-go — no slide deck.

[Book a partner fit call →](#)

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