WORKBOOK FOR NON-TECHNICAL BUSINESS LEADERS

AI ROADMAP FOR NON-TECH BUSINESSES

A clear, hype-free workbook showing where AI can actually help your business — and where it won't.

THE DEV GUYS

Think deeply. Build simply. Ship fast.

WHY THIS WORKBOOK EXISTS

Introduction

If you run a business today, you are expected to "have an AI strategy". Everyone around you seems to be piloting something, buying something, or promising something. But most non-technical leaders are stuck between two equally bad options:

• Saying "yes" to whatever their vendors or teams propose, hoping some of it works.
• Saying "no" to everything because it feels confusing, risky, or like pure hype.

This workbook is for the leaders who want a third path: a calm, practical way to see where AI genuinely fits into their business — and where it doesn't.

You don't need to understand models, parameters, or architectures. You do need to understand your workflows, your data, and your decision points. AI is just a tool that sits on top of those.

HOW TO USE THIS

You can fill this alone or with your leadership team. The goal is not to "finish" it — it's to think clearly. By the end, you should have:

- A short list of AI opportunities that actually matter to your P&L.
- A visible set of places where AI will *not* help (and that's fine).
- A realistic sequence of projects instead of a random pile of pilots.

Use it as a lens, not a checklist. The best roadmap is the one that you can explain to your CFO in one slide.

> *AI strategy is just business strategy with fewer buzzwords.*

STEP 1 — BUSINESS FIRST

1. Start With Outcomes, Not Algorithms

Most AI conversations start with technology: "Can we use ChatGPT here?", "Should we build a bot?", "What if we automate support?" That's the wrong direction.

For non-technical leaders, the only useful place to start is outcomes:

• What are the 3–5 business outcomes you care about this year?
• Where are people currently overworked, overwhelmed, or error-prone?
• Which decisions are slow because information is scattered?

AI is helpful when it moves a real needle: revenue, margin, time-to-serve, error rate, compliance risk. If you can't tie an idea to one of these, don't call it a roadmap — call it an experiment.

Leaders who skip this step collect tools. Leaders who sit with this step build leverage.

Questions for Your Leadership Team

What are the 3–5 outcomes that matter most this year?

Where do we repeatedly say "we just don't have enough people"?

Where do mistakes cost us the most money or reputation?

Which decisions are slow because the data is hard to see?

Where do customers complain about waiting, confusion, or inconsistency?

STEP 2 — SEE THE WORK

2. Map Workflows, Not Tools

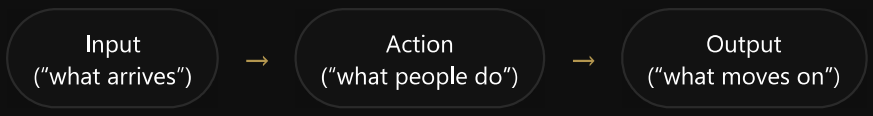
Before you decide "where AI fits", you need to see how work actually flows through your business today — not how you think it flows, but how it really happens on the ground.

Ask one question: **"What happens between the moment X starts and the moment Y is done?"** Then write out the steps in simple language.

For example:

- Lead comes in → assigned to salesperson → follow-up → quote → revision → close / lost.
- Support ticket raised → triaged → answered → escalated → resolved → follow-up.
- Invoice generated → sent → reminder → escalation → payment received.

Each step has three things: inputs (what we need), action (what we do), and outputs (what moves forward). AI only helps if it can improve one of those.



AI belongs where inputs are messy, actions are repetitive, and outputs are predictable enough to check.

STEP 3 — PRIORITISE

3. Score AI Use Cases by Impact, Effort, and Risk

Once you've listed possible use cases, you need a way to decide what to do first. "Interesting" is not a decision criterion. "High LinkedIn visibility" is not either.

Use a simple 2x2 in your head:

Vertical axis: Business impact (low → high)
Horizontal axis: Implementation effort (low → high)

Quick Wins
High impact, low effort.
Examples: smarter routing of tickets, automated email drafts, summarising calls.

Strategic Bets
High impact, high effort.
Examples: AI-assisted pricing, demand forecasting, personalised journeys.

Nice-to-Haves
Low impact, low effort.
Do them only if they support something bigger.

Avoid for Now
Low impact, high effort.
These are the graveyard of enthusiasm.

Add one more lens: **risk.** Where is it safe to let AI act, and where must a human approve?

- Customer-facing content that can be corrected later → lower risk.
- Financial decisions, compliance steps, safety-critical workflows → higher risk.

Your roadmap should start in the top-left: high impact, low effort, acceptable risk. Everything else comes later.

4. Fix the Foundations Before You Blame the Model

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Many AI projects struggle not because the AI is bad, but because the underlying data and processes are chaotic.

If your CRM is incomplete, your support tickets are untagged, and your SOPs live in ten different folders, any model will reflect that mess back to you.

Before you invest heavily in AI, ask:

- Is our data for this use case at least 70–80% complete?
- Do we agree on what "good" looks like in this workflow?
- Can we describe the process in 5–10 clear steps?

Good foundations are not glamorous, but they are the only way to get repeatable AI results.

5. Design Human-in-the-Loop by Default

The fastest way to lose trust in AI is to let it act silently, with no human visibility, in places that actually matter.

A safer pattern for non-tech businesses:

- AI drafts → humans approve.
- AI suggests → humans decide.
- AI monitors → humans investigate exceptions.

This keeps your team in control while still gaining leverage from automation. Over time, as confidence grows, you can selectively expand what the system can do autonomously.

AI should make your best people stronger, not disappear them from the loop.

COMMON TRAPS

6. Avoid the Three AI Traps for Non-Tech Leaders

Most failed AI initiatives don’t die because the technology was impossible. They die because they fell into predictable traps.

The Shiny Demo Trap 01

A vendor shows an impressive demo. The team gets excited. A pilot is launched with no clear success metric, no real owner, and no integration path. Six months later, nobody remembers why it started.

The Pilot Graveyard 02

You run many small pilots that never make it to production. Each one teaches you something, but nothing changes your core business. Energy is spent, trust erodes, and “AI” becomes a word people roll their eyes at.

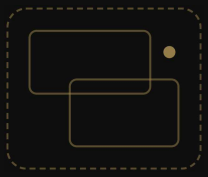
The Full Automation Fantasy 03

Leaders imagine entire departments replaced overnight. In reality, the work is more nuanced. Good AI projects start with assistance and augmentation, not instant replacement.

A good roadmap has fewer, better projects — each with a clear owner, a definition of success, and a path to production.

7. How to Work With Vendors and Internal Tech Teams

As a non-technical leader, your job is not to design the model. Your job is to frame the problem so well that good technical people can solve it without guessing.



- **Start with the business outcome.** "Reduce average response time by 40%" is better than "build us a chatbot".
- **Define the boundary.** What can the system do? What must always stay with humans?
- **Expose real data and edge cases.** Let them see messy tickets, weird customer emails, exceptions.
- **Ask for a simple success definition.** "We'll call this successful if…"
- **Agree on a rollout path.** Pilot → monitored production → broader roll-out.

The more clearly you describe reality, the less guesswork your technical partners have to do — and the fewer surprises you'll get.

Ask vendors: "Show me where this has worked in a business like mine — and what broke the first time."

8. Signs Your AI Roadmap Is Actually Healthy

You'll notice these signs:

- You can summarise your AI roadmap on one slide tied to real business metrics.
- Your team talks about workflows and outcomes, not tools and buzzwords.
- There are more "assistive" use cases than fully autonomous ones.
- Pilots have owners, timelines, and clear success criteria.
- Your finance team understands why these projects exist.
- You've explicitly written down where AI will *not* be used (for now).

9. The Non-Tech Leader's AI Roadmap Checklist

Before you commit to an AI project, ask:

- ✓ Which business outcome does this support (revenue, cost, risk, speed)?
- ✓ Which workflow is this attached to? Can we describe it in 5–10 steps?
- ✓ Do we have enough data and process clarity for this to be repeatable?
- ✓ Where will humans stay in the loop? Who is accountable?
- ✓ How will we measure success in the first 90 days?
- ✓ If this works, what is the path to production (beyond a pilot)?
- ✓ If this fails, what will we have learned that is still valuable?

If you can answer these clearly, you're not "doing AI" — you're running a real business initiative that happens to use AI.

"AI should make your business feel calmer, clearer, and more in control — not louder and more chaotic."

A good AI roadmap for a non-technical business is not a list of trendy tools. It is a sequence of well-chosen projects that make your best people more effective and your operations more predictable.

You don't need to chase every wave. You need to understand a few critical workflows deeply, choose the right leverage points, and execute with discipline.

When that happens, AI stops being hype and becomes infrastructure — quietly supporting the way you already create value.