

WYN

20

THE AGENCY AI ADOPTION CHECKLIST

20 questions to answer before you roll out
another AI tool, so it actually gets used.

HOW TO USE THIS

MOST AI TOOLS FAIL AFTER THE LICENCE IS SIGNED

Agencies rarely struggle to find AI tools. They struggle to make them part of how work actually moves through the team. This checklist covers the questions that decide whether a rollout sticks, in the order we work through them with agency teams.



01

Take it with the people who'll use the tool, not only the people buying it.

02

Tick each question you can answer with confidence today.

03

Anything you can't tick is where the work is. Score yourself at the end.

1



START WITH THE BOTTLENECK

The right first project is the most painful, most repeated piece of work, not the most impressive demo.

☐

Can you name the task you're trying to fix?

One specific piece of work, such as first-draft social copy or weekly client reporting, rather than "content" or "efficiency".

☐

Do you know roughly how often it happens and who does it?

A rough weekly count and the roles involved is enough to start.

☐

Is it repeated enough to be worth changing?

Work that happens weekly across several people beats a quarterly task.

☐

Have you asked the people who do it where the time really goes?

The real bottleneck is often a handover or an approval, not the writing itself.

☐

Do you know what "better" looks like?

Faster, fewer revisions, more consistent, or freeing a senior person's time. Pick one.



PICK PROBLEMS BY HOW OFTEN THEY HAPPEN AND WHAT THEY COST, NOT BY HOW GOOD THE DEMO LOOKS.

2



INTEGRATE, DON'T INSTALL

A tool in a separate tab is a toy. A tool connected to the brief, the data and the approval route is infrastructure.

☐**Do you know where the tool sits in the workflow?**

Which step it replaces or speeds up, and what happens immediately before and after it.

☐**Can it get the inputs it needs without copy and paste?**

Briefs, brand guidelines, past work, client data: wherever they live today.

☐**Does its output land where the next person needs it?**

In the doc, the deck, the task or the report, rather than in someone's chat history.

☐**Have you removed a step, not just added one?**

If the old process still runs alongside the new tool, nobody saves any time.



ASK WHAT YOU SHOULD BUILD AROUND A TOOL BEFORE YOU ASK WHICH TOOL TO BUY.

3



PEOPLE DECIDE WHETHER IT WORKS

Teams resist what they don't understand and fear what they weren't asked about.

☐

Has someone been given ownership of the rollout?

One named person with time set aside, not a shared responsibility.

☐

Have you explained what changes for each role, and what doesn't?

Be specific about the tasks, not general about "the future of work".

☐

Is the training built around their real work?

Practise on this week's briefs, not on generic examples.

☐

Is there somewhere to share what's working?

A channel, a short weekly slot or a shared prompt library, so good habits spread.



TRAINING BUILT AROUND PEOPLE'S REAL WORK BEATS ANY ROLLOUT PLAN.

4



DATA, RISK AND CLIENTS

Decide the rules before something goes wrong, not after.

☐

Do you know what data the tool can see, and where it goes?

Check the provider's data and training terms for the plan you're on.

☐

Is there a simple rule on what must never go into it?

For example: no unreleased client work, personal data or financials without approval.

☐

Do your client contracts allow it?

Some contracts restrict AI use on their work or require you to tell them.

☐

Is a person accountable for checking output before it reaches a client?

AI can draft. A named person signs it off.



AI CAN DRAFT. A NAMED PERSON SIGNS IT OFF.

5



MEASURE AND KEEP GOING

Waiting is a decision too, but so is never checking whether something worked.

☐

Did you note how the task worked before you started?

Even a rough baseline makes the result easy to judge.

☐

Is there a date to review it?

Four to six weeks in is usually enough to see if it's sticking.

☐

Do you know what you'll do if it isn't working?

Fix the workflow, retrain, or stop. Stopping is a valid result.

☐

Have you picked the next bottleneck?

Adoption builds momentum one useful workflow at a time.

HOW DID YOU DO?



UNDER 10

10-15

16-20

16-20 TICKS

You're ready to roll out. Keep the review date in the diary.

10-15 TICKS

Close. Fix the gaps in sections 2 and 3 first: they decide whether people keep using it.

UNDER 10

Pause the rollout and start with section 1. A clear bottleneck makes everything else easier.

WHAT NEXT

WORK THROUGH IT WITH US

WYN helps agencies and marketing teams work out where AI fits, train their people to use it, and build the tools and automations that make the difference.

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