

Kintera AI Pilot- CEO Quick Checklist

1. Leadership Signal

- This matters enough to try
- One executive is visibly backing it (CEO or direct report)

2. Light Ownership

- One internal point person (champion, hands-on, not a manager)
- Limited time commitment, focused on coordination and feedback

3. IT Support (Minimal)

- IT is aware and supportive
- One-time setup and basic availability if issues arise

4. Pilot Structure

- Start with Auto Loan Quality Control
- Run in parallel with current process
- No integrations or workflow changes during pilot

5. Check-Ins

- Short weekly check-in (~15 minutes)
- Focused on what works and what does not

6. Guardrails

- Use existing policies
- Security and compliance expectations met
- We can stop anytime

7. Time, Cost, Decision

- About one month
- Roughly the cost of a short-term contractor
- Clear stop, adjust, or expand decision at the end