

# CHECKLIST: 10 STEPS FOR AI ADOPTION AND RAPID VALUE

## Prep Work:

- Identify your current loan manufacturing workflows.
- Describe in detail the workflow currently used to get trusted data from PDFs and other document sources
- Identify documents and field information used for each workflow.
- Identify what are the highest value workflows to be fully automated.
- Define success criteria: reach a consensus between sales, processing, and underwriting on above items.

## Transformational Actions:

- Select your trusted data automation vendor.
- Draft a detailed description of the first use cases your organization wants to automate.
- Draft your project plan and identify project leadership.
- Implementation completed, including pilot.
- Review and analyze production usage and rapid value measurement.

