

FREE RESOURCE

AI Readiness Checklist

Twelve questions across people, process, and technology that reveal exactly where your team stands — and what to address before your first AI initiative.

Tick every box you can answer **“yes”** to with confidence. Be honest — the gaps are the point. Your total, and how you score within each section, tells you whether you’re ready to execute or whether some groundwork comes first.

1 PEOPLE & LEADERSHIP

- ☐ There is a single, **named owner** accountable for the AI initiative’s outcome.
- ☐ Leadership is aligned on **why** we’re investing in AI and what success looks like.
- ☐ Our teams have a baseline level of **AI literacy** — they understand what these tools can and can’t do.
- ☐ We have capacity for **change management** — communication, training, and support — not just tool purchase.

2 PROCESS & WORKFLOWS

- ☐ We’ve identified the **specific, high-value workflows** where AI should be applied first.
- ☐ Those workflows are **documented** clearly enough to know where time and friction actually go.
- ☐ We’ve defined **role-specific use cases** rather than a generic, one-size-fits-all rollout.
- ☐ We have a **success metric and a baseline** captured *before* rollout, so we can prove impact.

3 TECHNOLOGY & DATA

- ☐ Our data is **accessible and clean enough** to power the automation we’re considering.
- ☐ The tools can **integrate** with the systems our team already uses day to day.
- ☐ We have clear guidelines for **security, privacy, and acceptable use** of AI tools.
- ☐ Any pilot is designed with a realistic **path to production** — not just a one-off demo.

HOW TO READ YOUR SCORE

- 10–12** You’re ready to move — focus on disciplined execution.
- 6–9** Solid foundation with real gaps — close them before you scale.
- 0–5** Start with an AI Readiness Audit before committing budget.
- Watch for** Scoring low in any single section (people, process, or technology) is a red flag, even if your total looks healthy.

Scoring low in two or more areas?

That’s exactly where an AI Readiness Audit helps — a structured, fixed-fee assessment that turns these gaps into a prioritized plan you can act on.

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