



# Business AI Readiness Checklist

This checklist helps leadership teams evaluate whether their organization is ready to implement AI solutions that address operational bottlenecks, risk exposure, and growth constraints. The goal is not simply to determine whether AI can be used, but to identify where a custom AI solution could unlock the greatest operational value.

**For each question answer in the check box:**

**0 = No      1 = Somewhat      2 = Yes**

## Section 1: Leadership Alignment

- 1. Do senior leaders agree that AI will impact your industry within the next 3–5 years?
- 2. Has your leadership team discussed where AI could improve productivity or margins?
- 3. Is there an executive sponsor responsible for exploring AI opportunities?
- 4. Are leaders open to redesigning workflows if AI reveals a better way to operate?
- 5. Does leadership see AI as a strategic capability rather than just a tool?

**Scoring Insight: If leadership alignment is weak, AI projects often fail regardless of technology quality.**



## Section 2: Operational Friction

Identify areas where work slows down, errors occur, or teams rely heavily on manual processes.

- 1. Do employees spend large amounts of time searching for information?
- 2. Are there repetitive workflows that depend heavily on manual input?
- 3. Are project delays common due to communication breakdowns?
- 4. Do teams manually summarize reports, emails, or documents?
- 5. Are operational insights trapped inside spreadsheets or disconnected systems?

**High scores in this section often signal strong opportunities for workflow AI automation.**

## Section 3: Decision Intelligence

- 1. Are important decisions often made without complete or timely data?
- 2. Do managers rely heavily on experience instead of predictive insight?
- 3. Are forecasts frequently inaccurate (revenue, schedules, inventory, staffing)?
- 4. Is reporting slow or difficult to produce?
- 5. Do leaders lack real-time visibility into operational performance?

**Organizations scoring high here may benefit from AI forecasting and decision-support systems.**

## Section 4: Data Availability

AI requires usable data to generate insight.

- 1. Do you collect operational data in digital systems?
- 2. Is your data spread across multiple disconnected platforms?
- 3. Are important business insights hidden inside documents, emails, or PDFs?
- 4. Do you struggle to convert raw data into actionable insights?
- 5. Is data governance inconsistent or unclear?

**Companies often have more usable AI data than they realize.**

## Section 5: Workforce Productivity

- 1. Are skilled employees spending time on administrative tasks?
- 2. Do employees recreate work that already exists elsewhere in the organization?
- 3. Are employees overwhelmed with documentation or reporting requirements?
- 4. Are subject-matter experts constantly answering the same questions?
- 5. Are training and onboarding processes slow?

**These are strong signals for AI assistants and knowledge systems.**





## Section 6: Risk and Compliance

- 1. Does your organization face regulatory or compliance requirements?
- 2. Are contracts or policies reviewed manually?
- 3. Do errors in documentation create financial risk?
- 4. Is safety or operational risk difficult to monitor consistently?
- 5. Do incidents often occur due to communication failures?

**AI systems can significantly improve risk detection and compliance automation.**

## Section 7: Growth Constraints

- 1. Is growth limited by hiring constraints?
- 2. Are new locations, projects, or clients difficult to scale operationally?
- 3. Do leaders struggle to maintain quality as the company grows?
- 4. Are profit margins compressed by operational inefficiencies?
- 5. Do competitors appear to be adopting automation faster?

**These signals suggest AI may be necessary to scale without proportionally increasing headcount.**

## Scoring Guide

**For each question answer:**

**0 = No      1 = Somewhat      2 = Yes**

Total possible score: 70

Score Interpretation:

0–20: Early AI Awareness Your organization is still developing awareness of AI opportunities.

21–40: AI Opportunity Zone Several operational areas could benefit from AI-assisted workflows.

41–55: AI Transformation Candidate Your organization likely has multiple high-value opportunities for AI implementation.

56–70: High-Impact AI Candidate You are likely leaving significant efficiency and strategic advantage on the table without AI.

## What Happens Next

Organizations scoring above 40 often benefit from a structured AI assessment. The next step is typically an AI Discovery Session, where we identify:

- The top 3 operational pain points AI can solve
- Quick-win AI implementations
- Longer-term AI infrastructure opportunities
- Expected ROI and operational impact

