



AI READINESS CHECKLIST

A 15-point assessment for deciding whether an AI pilot is ready for real workflow use.

INSIDE THIS RESOURCE

- Data readiness
- Pilot scope
- Workflow ownership
- Adoption path



CHECKLIST

DATA READINESS + WORKFLOW OWNERSHIP

Data readiness

- The workflow has usable source data, not only scattered notes or undocumented tribal knowledge.
- The data owner can explain where records live, who maintains them, and what fields are reliable.
- Sensitive data boundaries are known before model or vendor selection begins.
- The team can provide representative examples for testing without exposing unnecessary information.

Workflow ownership

- A business owner is accountable for the workflow and can approve scope decisions.
- Users who do the work are available for interviews, testing, and feedback.
- The workflow has enough repetition to justify automation or AI assistance.
- Existing exceptions, handoffs, and approval points are documented before prototype work starts.



CHECKLIST

PILOT SCOPE + ADOPTION PATH

Pilot scope

- The first pilot can be described in one sentence with a clear start and finish point.
- Success can be measured with time saved, error reduction, cycle time, capacity, quality, or another practical metric.
- The pilot is small enough to prototype without restructuring the whole business.
- The team knows what would make the pilot a no-go, not just what would make it successful.

Adoption path

- Users can test the prototype in or near the real workflow.
- Someone owns training, documentation, and change management after the prototype.
- The team has a plan for human review, quality control, and exception handling.



CHECKLIST

SCORING GUIDE + ACTION PLAN

Scoring guide

Score each item from 1 to 5. A score of 1 means the answer is unclear or not ready. A score of 5 means the answer is documented, owned, and ready for pilot planning.

- 60–75: ready for a scoped pilot.
- 40–59: promising, but tighten ownership, data, or success metrics first.
- Below 40: use discovery work before prototype work.

Action plan

- Pick one workflow with clear ownership.
- Identify the data boundary and the systems involved.
- Define the smallest useful prototype.
- Decide the review, risk, and adoption path before build work begins.