

AI readiness assessment checklist

36 questions across six areas, for one named workflow at a time. Answer Y only if you can produce what's in the "counts as yes" column. Otherwise mark N, or DK (don't know). A "yes" without the evidence is a "don't know."

WORKFLOW

COMPLETED BY

DATE

HOW TO Work through the areas in order. If questions 2 and 3 come back DK, count and time the workflow for a week before going further. When you're done, sort every N and DK on the sorting sheet at the end. Don't add the answers up.

01 -- The work itself

#	QUESTION	COUNTS AS "YES" WHEN	Y / N / DK	EVIDENCE OR NOTE
1	Can you name the workflow you want AI to help with?	It's written down in plain words, such as "quote follow-up," not "sales"	☐ Y ☐ N ☐ DK	
2	Do you know how many times it happens in a week?	You have a count from a system or a week's tally, not a guess	☐ Y ☐ N ☐ DK	
3	Do you know how long it takes per job?	Someone has timed it at least three times while doing it	☐ Y ☐ N ☐ DK	
4	Can you point to where it waits or gets retyped?	You have a list of the handoffs, such as "details copied from the inbox into the field service app"	☐ Y ☐ N ☐ DK	
5	Does everyone who does it do it the same way?	Two people describe the same steps without comparing notes first	☐ Y ☐ N ☐ DK	
6	Do you know what the saved time would go to?	You can name it: more bids sent, faster invoicing, fewer evenings	☐ Y ☐ N ☐ DK	

02 -- Data

#	QUESTION	COUNTS AS "YES" WHEN	Y / N / DK	EVIDENCE OR NOTE
7	Does the information the workflow needs live in a system?	It's in software, not in someone's head or a paper tray	☐ Y ☐ N ☐ DK	
8	Can you export it yourself, today?	You've run the export and have the file	☐ Y ☐ N ☐ DK	
9	Are the fields it needs filled in on recent jobs?	You've done the 20-record count in the data template	☐ Y ☐ N ☐ DK	
10	Is there one place everyone treats as the right answer?	When the spreadsheet and the system disagree, everyone knows which one wins	☐ Y ☐ N ☐ DK	
11	Do you know which records hold personal information?	You can say which fields have customer or employee details	☐ Y ☐ N ☐ DK	
12	Is the key spreadsheet owned and backed up?	It has a named owner and lives somewhere other than one laptop	☐ Y ☐ N ☐ DK	

03 --- Systems

#	QUESTION	COUNTS AS "YES" WHEN	Y / N / DK	EVIDENCE OR NOTE
13	Is every system the workflow touches on a list?	One row per system, with its owner and monthly cost	☐ Y ☐ N ☐ DK	
14	Can each one send and receive data on your current plan?	You've checked the plan's feature list, not the product's website	☐ Y ☐ N ☐ DK	
15	Does each person have their own login?	No shared accounts, and former staff are switched off	☐ Y ☐ N ☐ DK	
16	Is multifactor authentication on for email and the main systems?	You've checked the admin settings	☐ Y ☐ N ☐ DK	
17	Do you know when a backup was last restored?	There's a date, and someone checked the restored data	☐ Y ☐ N ☐ DK	
18	Do you know which AI tools people already use?	A list, including personal accounts, gathered by asking without blame	☐ Y ☐ N ☐ DK	

04 --- People

#	QUESTION	COUNTS AS "YES" WHEN	Y / N / DK	EVIDENCE OR NOTE
19	Is one named person going to own the workflow day to day?	A name, agreed by that person, not assigned in their absence	☐ Y ☐ N ☐ DK	
20	Do they have time for it in the first month?	A few hours a week, actually cleared from something else	☐ Y ☐ N ☐ DK	
21	Have the people doing the work been asked what slows them down?	Their answers are written down	☐ Y ☐ N ☐ DK	
22	Has anyone used an AI tool for real work here?	They can show you an example, not just describe one	☐ Y ☐ N ☐ DK	
23	Has the owner said out loud what the change is for?	The team has heard that it's about removing paperwork, not jobs	☐ Y ☐ N ☐ DK	
24	Is someone going to check AI output before customers see it?	A named reviewer for anything that leaves the building	☐ Y ☐ N ☐ DK	

05 --- Rules

#	QUESTION	COUNTS AS "YES" WHEN	Y / N / DK	EVIDENCE OR NOTE
25	Is there a written rule on what can go into AI tools?	One page, shared with the team	☐ Y ☐ N ☐ DK	
26	Do you know what contracts, insurers, or regulators say about your data?	You've read the relevant clauses, or asked whoever handles compliance	☐ Y ☐ N ☐ DK	
27	Is someone named to approve new AI tools?	A name, so a new tool doesn't arrive on a credit card unnoticed	☐ Y ☐ N ☐ DK	
28	Do you know which steps still need a person's sign-off?	They're marked on the workflow, such as "estimator approves every price"	☐ Y ☐ N ☐ DK	
29	Would you notice if the AI got something wrong?	A spot check exists, with a person and a frequency	☐ Y ☐ N ☐ DK	
30	Could you switch it off and still do the work?	The old way is written down and still works	☐ Y ☐ N ☐ DK	

06 --- Direction

#	QUESTION	COUNTS AS "YES" WHEN	Y / N / DK	EVIDENCE OR NOTE
31	Can the owner say what the business wants more of this year?	One sentence, such as "more commercial work without adding office staff"	☐ Y ☐ N ☐ DK	
32	Does this workflow connect to that goal?	You can explain the link in a sentence	☐ Y ☐ N ☐ DK	
33	Is there a number you'd judge the first build by?	Hours per week, days to invoice, quotes sent per estimator	☐ Y ☐ N ☐ DK	
34	Do you know that number today?	It's measured now, before anything changes	☐ Y ☐ N ☐ DK	
35	Is there a budget range and a decision date?	Both are written down	☐ Y ☐ N ☐ DK	
36	Have you written down what you've tried before and why it stopped?	A short note on past tools or pilots	☐ Y ☐ N ☐ DK	

Data readiness template

One row for each piece of information the workflow needs. Pull your last 20 jobs, quotes, or work orders and count how many have each field filled in correctly.

FIELD THE WORKFLOW NEEDS	WHERE IT LIVES	WHO ENTERS IT	FILLED IN (OF LAST 20)	CAN YOU EXPORT IT?	PERSONAL INFO?
			/ 20	Y · N	Y · N
			/ 20	Y · N	Y · N
			/ 20	Y · N	Y · N
			/ 20	Y · N	Y · N
			/ 20	Y · N	Y · N
			/ 20	Y · N	Y · N
			/ 20	Y · N	Y · N
			/ 20	Y · N	Y · N
			/ 20	Y · N	Y · N
			/ 20	Y · N	Y · N

Sorting sheet

Write the number of each N or DK question under its pile. **Blocks:** fix before building. **Fix alongside:** can be done in the first few weeks. **Doesn't matter here:** a real gap, just not this workflow's. Count the DKs separately; each is a question nobody in the business can answer yet.

FIX BEFORE BUILDING

Blocks this workflow

FIRST FEW WEEKS

Fix alongside

NOT THIS WORKFLOW

Doesn't matter here

COUNT SEPARATELY

Don't know yet