

The AI Readiness Checklist

Build with Structure. Adopt with Integrity.

Foundation

- ☐ Define the business problem before selecting a tool
- ☐ Identify clear success metrics for each AI use case
- ☐ Document your current workflow and data sources
- ☐ Confirm leadership alignment on goals and risk tolerance

Data & Privacy

- ☐ Inventory the data your team plans to share with AI tools
- ☐ Classify data sensitivity (public, internal, confidential, regulated)
- ☐ Verify vendor data handling, retention, and training-use policies
- ☐ Establish a clear policy for personal or client information

Responsible Use

- ☐ Require human review on customer-facing or high-impact outputs
- ☐ Disclose AI assistance where it affects users or stakeholders
- ☐ Test for bias, errors, and hallucinations before rollout
- ☐ Document tool limitations and acceptable use

Implementation

- ☐ Pilot with one workflow before scaling
- ☐ Train the team on prompts, review steps, and escalation
- ☐ Measure outcomes against your original success metrics
- ☐ Schedule quarterly reviews of tools, vendors, and policies