



AI READINESS SELF-ASSESSMENT WORKSHEET

Evaluate your organization's AI readiness and identify high-impact starting points. This practical tool guides you through assessing your processes, data, and strategic alignment to launch successful AI initiatives.

FROM AI AWARENESS TO ACTION: DETERMINE YOUR STARTING POINT

This self-assessment will help you evaluate your organization's readiness for AI adoption and identify the most promising starting points for your AI journey. Answer each question honestly to get an accurate picture of where you stand.

SECTION ONE: BUSINESS PROCESS EVALUATION

Identify 3-5 operational processes in your business that are:

- Time-consuming or repetitive
- Data-heavy but currently analyzed manually
- Creating friction in customer experience
- Requiring rapid decision-making with clear parameters
- Involving frequent errors or inconsistencies

Rate each process on a scale of 1-5 (1=low, 5=high):

Process Name	Time Consumed	Volume	Repetitiveness	Impact if Improved	Total Score

Which process scored highest? This may be your ideal starting point:

Process Selection Insights: Focus on the process with the highest total score as your potential starting point for AI implementation. Processes scoring high in "Impact if Improved" and "Repetitiveness" are often ideal candidates, as they offer significant ROI and are more suitable for automation and AI enhancement.

SECTION TWO: DATA READINESS ASSESSMENT

For the highest-scoring process from Section 1, answer the following:

DATA AVAILABILITY

Do you have historical data for this process? ☐ Yes ☐ No ☐ Partial

Is this data digitized (not paper-based)? ☐ Yes ☐ No ☐ Partial

Is the data stored in an accessible format (database, spreadsheet)? ☐ Yes ☐ No ☐ Partial

Do you have at least 6 months of data? ☐ Yes ☐ No

DATA QUALITY

Is the data relatively complete (few missing values)? ☐ Yes ☐ No ☐ Unsure

Is the data reasonably accurate and reliable? ☐ Yes ☐ No ☐ Unsure

Is the data consistent (same format, same metrics)? ☐ Yes ☐ No ☐ Unsure

Do you have access to the data without major privacy/security concerns? ☐ Yes ☐ No ☐ Requires Review

DATA INSIGHTS

Can you clearly articulate what insights from this data would be valuable? ☐ Yes ☐ No ☐ Partially

Do you know what actions you would take based on these insights? ☐ Yes ☐ No ☐ Partially

Data Readiness Insights: The more "Yes" answers you selected, the more data-ready you are for AI implementation with this process. If you have mostly "Yes" responses, you likely have sufficient data quality and accessibility to move forward. Several "No" or "Partial" responses indicate you may need to improve your data collection, storage, or quality before implementing AI for this process.

SECTION THREE: ORGANIZATIONAL READINESS

LEADERSHIP SUPPORT

- Is leadership aware of and interested in exploring AI? ☐ Yes ☐ No ☐ Somewhat
- Is there budget available for initial AI projects? ☐ Yes ☐ No ☐ Potentially
- Is leadership willing to allow experimentation with AI solutions? ☐ Yes ☐ No ☐ Uncertain

TEAM READINESS

- What is your team's comfort level with new technology? ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 low high
- Do you have IT staff or partners who can support AI implementation? ☐ Yes ☐ No ☐ Limited
- Can you identify at least one potential AI champion on your team? ☐ Yes ☐ No
- If yes, who? _____

CULTURAL FACTORS

- How would you rate your organization's openness to change? ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5
- How data-driven is your organization's decision-making? ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5
- How would you characterize the general attitude toward AI?
☐ Enthusiastic ☐ Curious ☐ Neutral ☐ Skeptical ☐ Resistant

Organizational Readiness Insights: Higher scores in leadership support, team readiness, and cultural factors indicate your organization is better prepared for AI adoption. Pay special attention to the "openness to change" and "data-driven decision-making" scores — ratings of 4-5 suggest a culture that will embrace AI, while lower scores may require more change management efforts before proceeding.

SECTION FOUR: STRATEGIC ALIGNMENT

BUSINESS OBJECTIVES

What are your top 2-3 business goals for the next 12 months?

1. _____
2. _____
3. _____

AI-BUSINESS CONNECTION

How might AI help achieve these goals? Be specific:

1. _____
2. _____
3. _____

SUCCESS METRICS

What specific metrics would indicate success for your first AI project?

1. _____
2. _____
3. _____

Strategic Alignment Insights: The strongest AI initiatives directly support your top business objectives. Look for clear connections between your business goals and potential AI applications. Well-defined success metrics are crucial—they should be specific, measurable, and meaningful to your organization's stakeholders. If you struggle to articulate these connections or metrics, revisit your strategic priorities before proceeding.

SECTION FIVE: ACTION PLANNING

Based on your answers in the first four sections, answer the following:

RECOMMENDED STARTING POINT

Your ideal first AI project likely involves:

Hint: This is typically the highest-scoring process with sufficient data quality and organizational support.

PILOT PROJECT SCOPE

What specific function of this process could AI enhance?

What would a successful 4-8 week pilot look like?

Who needs to be involved in this pilot?

RESOURCE NEEDS

What external expertise might you need?

What internal resources need to be allocated?

What is a reasonable budget range for this pilot?

Action Planning Insights: A well-defined pilot project with clear scope, participants, and resource allocations sets the stage for success. Keep your first AI initiative focused and manageable—aim for completion within 4-8 weeks. This approach allows for quick wins, valuable learning, and builds momentum for future AI projects while minimizing risk and resource commitment.

INTERPRETING YOUR RESULTS

Ready for AI Adoption: If you identified a high-impact process with good data availability, leadership support, and clear success metrics, you're ready to begin a focused AI pilot project.

Building Readiness: If you have several "No" or "Unsure" answers, particularly in the Data Readiness section, you may need to improve your data collection and management before implementing AI solutions.

Developing Foundations: If organizational readiness is your main challenge, focus on education and small demonstrations to build support before launching larger initiatives.

NEXT STEPS

1. Schedule a meeting with key stakeholders to discuss your assessment results.
2. Develop an action plan for your highest-potential AI opportunity.
3. Consider seeking external expertise to guide your initial implementation.

Need help interpreting your results or planning your next steps?
Book a complimentary 30-minute AI Strategy Session at
leadingaiagility.com/strategy.