

AI readiness worksheet

Find what your first project needs, what is missing and who can resolve it.

Six practical readiness checks

A place to record gaps and owners

A clear decision on the first build

A free worksheet from ailevrg.com/guides/ai-readiness-assessment

Start with what you already know. Leave a question blank if it does not affect this decision. This is a planning sheet, not a certified score.

01 The project

Business goal: what should we be able to do that we cannot do well today?

Who would benefit, and what evidence shows they need it?

First piece of work to change

Next possible use of what we build

02 Purpose

What would improve for clients, staff or the business?

What would tell us the first project was worth doing?

03 Work and decisions

Where does this job start and finish?

Who does it now? Who will approve the new way of working?

Which decisions must stay with people?

04 Knowledge and access

Which methods, records and rules does the work need?

Who can explain them and approve their use?

What must stay separate between clients, teams or regions?

05 Systems and support

Which existing systems must it use?

How will records stay current, and who fixes a failed update?

What could the next project reuse? What would still need new work?

06 People and change

Who will use it, check it and support it?

What time do they need for testing and training?

Who takes over when an answer is wrong or someone is away?

07 Cost and commitment

Who can fund the build and its ongoing costs?

What staff time does it need?

Which unknown could change the decision to proceed?

08 Missing answer 1

What we need to know

Who will find out

What they will check and by when

09 Decision

Proceed / Resolve a named issue / Choose a different first project

Reason

Person making the decision and date

Example: from one client service to a wider offer

Each later step needs its own proof, budget and agreed plan.

First build

What changes

Prepare one type of plan for an expert to approve.

What carries forward

Agreed methods, up-to-date client records and a tested review process.

Next possible build

What changes

Help clients check progress and prepare a revised plan.

What carries forward

The approved plan, the same client records and the rules for asking an expert.

Wider service

What changes

Offer ongoing support to more suitable clients.

What carries forward

Work that has been tested, with clear costs, access and support.