

The checklist

AI readiness checklist

Work through it with the people who do the work. Tick what's already true; the rest is your to-do list.

01 Goals and quick wins

- ☐ Write down the one or two business goals AI should help with this year.
- ☐ List five tasks your team repeats every week that follow the same steps.
- ☐ Pick one task where saving an hour a week would matter to someone senior.
- ☐ Name one person who owns AI decisions, even if it's you for now.
- ☐ Decide what "worth it" means before you start: time saved, fewer errors or faster replies.

03 Data and documents

- ☐ Know where your key documents live and who can open them.
- ☐ Update your templates, policies and FAQs before any AI tool relies on them.
- ☐ Mark the data that must never leave your systems: client, financial, health or personal.
- ☐ Check that you can export your data from your main tools, like your CRM, help desk and spreadsheets.
- ☐ Clean up one messy source, like a shared drive or inbox, as a pilot candidate.

05 People and training

- ☐ Name a champion on each team who tries things first and shares what works.
- ☐ Give people time to practice on their real work, not just a demo.
- ☐ Keep good prompts and examples in one shared place.
- ☐ Say plainly what AI will and won't be used for, so nobody has to guess.
- ☐ Agree when AI output needs a person to review it before it reaches a client.

02 Workflows and time sinks

- ☐ Map one workflow from start to finish, including every copy and paste between tools.
- ☐ Note where work waits on someone to read, sort or summarize something.
- ☐ Collect the questions your team answers over and over by email or chat.
- ☐ Flag the steps where a mistake is costly, and keep a person checking those.
- ☐ Ask the people doing the work what they would hand off first.

04 Tools, security and privacy

- ☐ List the AI tools people already use, including free personal accounts.
- ☐ Write a short policy on what data staff can and can't paste into AI tools.
- ☐ Check whether software you already pay for includes AI features you aren't using.
- ☐ Review each AI tool's data retention and model-training settings before you roll it out.
- ☐ Use company accounts with single sign-on where you can, not personal logins.

06 Measuring results

- ☐ Time the task you picked today, so you have a before number.
- ☐ Run one small pilot with a start date, an end date and a named owner.
- ☐ Track time saved, errors and how often people actually use it.
- ☐ Decide up front what result means you scale it, fix it or stop it.
- ☐ Review the pilot with the team, then pick the next workflow.

Want this done for you? The AI Readiness Sprint covers all of it in two weeks.

Book a call: nathanziemanski.com/pages/contact#cal