

Self-assessment worksheet

AI Readiness Checklist

Not ready to talk yet? Use this checklist to assess where your organization stands — and where the quick wins might be hiding.

Shadow AI Audit

Opportunity Scoring

Governance Gaps

Prioritization

Shadow AI Usage Audit

Before you can build anything new, you need to know what's already happening across your organization.

- ☐ Do you know which AI tools your team is currently using?
- ☐ Have you cataloged subscription costs across all departments?
- ☐ Are employees using personal AI accounts for work tasks?
- ☐ Do you have visibility into what data is being shared with AI tools?
- ☐ Have you identified which AI uses are creating value vs. noise?



Red flags

- "We're not sure what AI tools people are using"
- Multiple teams paying for the same AI subscriptions
- No policy on what can or can't be shared with AI tools

High-Value Automation Opportunities

Rate each opportunity you're considering on a 1–5 scale across impact and feasibility.

Impact assessment

Time savings potential	0 0 0 0 0
Cost reduction opportunity	0 0 0 0 0
Revenue / capacity increase	0 0 0 0 0
Current manual effort level	0 0 0 0 0
Repeatability of the task	0 0 0 0 0

Feasibility assessment

Data availability	0 0 0 0 0
Process clarity / documentation	0 0 0 0 0
Team buy-in / readiness	0 0 0 0 0
Technical complexity (inverse)	0 0 0 0 0
Organizational dependencies	0 0 0 0 0



Quick-win indicators

- High impact + high feasibility scores (4–5 on both)
- Tasks currently done more than 10 times per week
- Clear success metrics already exist
- Single team owns the process end-to-end

AI Governance Gap Assessment

Capability without guardrails creates its own kind of mess.
Check what's already in place.

- ☐ Do you have a written AI usage policy?
- ☐ Do employees know what data can and can't be shared with AI?
- ☐ Is there a process for evaluating new AI tools?
- ☐ Do you have security review requirements for AI tools?
- ☐ Is there accountability for AI-related decisions?
- ☐ Have you addressed intellectual property concerns?
- ☐ Do you have incident response plans for AI failures?
- ☐ Is there a budget owner for AI initiatives?

None

Answered "yes" to 0–2 questions

Emerging

Answered "yes" to 3–5 questions

Developing

Answered "yes" to 6–7 questions

Mature

Answered "yes" to all 8 questions

Business Impact Prioritization

List three to five potential AI opportunities, then score each one. Copy this worksheet for opportunities 2 and 3.

Opportunity 1

Description

Cost savings potential (\$/year)

Time savings potential (hrs/week)

New capacity created?

Yes

No

Revenue impact (\$/year)

Estimated effort

Small

Medium

Large

Team dependencies

Single

Few

Many

Data requirements

Easy

Medium

Hard

Risk if it fails

Low

Medium

High

Total priority score

Value × Feasibility = ____

- **Your results**

Your Readiness Snapshot

Circle or mark where you land on each dimension based on your answers above.

Shadow AI	Under control	Some visibility	Unknown
Opportunities	Mapped	Partially	Unclear
Governance	Mature	Developing	Emerging
Prioritization	Clear	In progress	Needed

• Next steps

Where To Go From Here

Match your snapshot to the engagement that fits where you are today.

AI Opportunity Sprint

\$15k

2–3 weeks · start here if Shadow AI is "Unknown" and Governance is "Emerging"

I'll shadow workflows, audit existing AI, and create a prioritized roadmap.

First AI Win

\$45k

~8 weeks · ready if Prioritization is "Clear" and you're ready to build

Pick one opportunity, build it, ship it, measure it.

AI Operating System

\$95k

12–16 weeks · ready if you've already shipped 1–2 wins and need scale

Ship 2–3 initiatives, plus governance and team training.

Fractional AI Advisor

\$5k/mo

Ongoing · for teams that need continued strategic guidance

Monthly reviews, architecture decisions, and prioritization help.

• Let's talk

Questions about your assessment?

Tell me what you're dealing with and I'll tell you honestly whether and how I can help — no proposal required to start the conversation.

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