

AI READINESS

AI Readiness Checklist

A practical self-assessment to complete before committing to AI adoption. Work through all three sections below, tick the boxes you can confidently answer “yes” to, and use the scoring guide at the end to see where your organisation truly stands.

For an expert, in-depth review — including your Microsoft 365 setup, data security, and staff readiness — see our professional AI Readiness Assessment on the final page of this guide.

Part One — The Five Core Areas

QUICK CHECK

Five Areas, Six Questions

AI readiness comes down to five things working together: your data, your infrastructure, your people, your strategy, and your culture. A weak link in any one of them can undermine an otherwise well-planned AI project. Use the six questions below as a fast gut-check across all five areas.

YES / NO ASSESSMENT · 6 QUESTIONS

- ☐ Do we know where our important business data lives, who owns it, and whether it's clean enough to trust with AI?
- ☐ Do we run secure, well-maintained, properly licensed systems, with backups and controls in place to test AI without risking live data?
- ☐ Do our people understand what AI can and can't do, know what not to share with it, and have someone coordinating training and support?
- ☐ Do we have clear, budgeted AI goals with identified use cases, a senior sponsor, and a realistic roadmap?
- ☐ Have we explained why we're exploring AI, and do staff feel safe asking questions and raising concerns?
- ☐ Overall, could we confidently start a small, well-governed AI pilot today?

Your score: ____ / 6

Part Two — AI Governance

GOVERNANCE

Are We Set Up to Govern AI Safely?

A practical AI policy should explain approved tools, data use rules, human review requirements, accountability, and incident reporting. Good governance builds trust, supports safe experimentation, and reduces risk — anywhere you can't tick "yes" is a candidate for action.

YES / NO ASSESSMENT · 5 QUESTIONS

- ☐ Do we have a written AI use policy that covers data use and regulatory requirements?
- ☐ Are ethical issues like bias, transparency, and accountability for AI decisions addressed?
- ☐ Do we maintain a risk register and review AI tools before staff use?
- ☐ Are permissions and access controls regularly checked?
- ☐ Do we monitor AI outputs for accuracy and harm, with a process for reporting incidents?

Your score: ____ / 5

Part Three — AI Pilot Readiness

NEXT STEPS

Are We Ready for a Pilot?

Use these yes / no questions to decide your next move. If you struggle to confidently tick most of them, it's a strong signal to book a professional AI readiness assessment before you start.

YES / NO ASSESSMENT · 5 QUESTIONS

- ☐ Is the use case clear and valuable, and are data and security controls adequate?
- ☐ Have pilot staff been trained, and are success metrics agreed?
- ☐ Is budget allocated for testing and maintenance?
- ☐ Do we have criteria to stop, pause, or expand, and can we manage risks without external help?
- ☐ Overall, are we ready for a low-risk AI pilot — and if not, should we book a professional assessment?

Your score: ____ / 5

How to Read Your Results

Treat your results as a tool to spot strengths and gaps, not a pass/fail test. For each section, divide your score by the number of questions to get a percentage, then check the band below.

SCORE	BAND	WHAT IT MEANS
100%	Fully ready	You're in excellent shape across this area — keep monitoring as things evolve.
78–99%	Strong foundation	Minor gaps only. Safe to move ahead with focused fixes alongside your plans.
55–77%	Developing readiness	A reasonable base, but real gaps remain. Address these before scaling up.
33–54%	Early stage	Significant groundwork is still needed before AI can be used safely here.
0–32%	Needs attention	This is a priority area — don't proceed with AI here until it's addressed.

What to Do Once You're Done

AI adoption should be deliberate and planned, not rushed or reactive.

IF FEW, LOW-RISK GAPS

Run a small pilot

Start with a small, well-defined pilot with clear metrics, training, and budget. Monitor results carefully.

IF WEAK FOUNDATIONS

Fix data, governance & security first

If data quality, governance, security, or leadership alignment are weak, address these first before scaling AI.

IF MANY WEAK AREAS

Foundational work

Focus on clean data, secure systems, staff awareness, governance, and realistic use cases before deploying tools.

PROFESSIONAL SUPPORT

Want an Expert View?

We Do Your IT Support offers professional AI readiness assessments for SMEs across Bristol, Bath, Cheltenham, Swindon, Gloucester, and the wider South West. Our assessment builds on this checklist with detailed reviews of Microsoft 365, data, infrastructure, security, governance, processes, staff readiness, and AI opportunities. You receive expert analysis, tailored recommendations, a written report, and a prioritised action plan.

- Expert review of Microsoft 365, data & security posture
- Written report with a prioritised action plan
- No pressure to buy unnecessary tools
- Tailored AI opportunities for your sector

Book your free assessment

Call us on **0117 911 8808** or visit wedoyour.it/ai-readiness-assessment

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