

# AI readiness assessment checklist

Use this checklist to inventory your current state. The goal is to understand the nuances of your environment so you know where AI can be integrated safely and what areas could be optimized ahead of AI implementation. Check off each item once it's been evaluated.

## DATA AND GOVERNANCE

- ☐ **Central access:**  
*Is your data centralized in a data warehouse or a data lake or scattered across sources?*
- ☐ **Data lineage:**  
*Is data lineage traceable and well-understood for different data assets?*
- ☐ **Data structure:**  
*Is your data in a format that AI agents can easily consume, with proper annotation and classification?*
- ☐ **Data sensitivity:**  
*Who can access what data sets? Are there specific types of data (that require stronger guardrails for the AI agent when accessing?*
- ☐ **Data quality:**  
*Does the data meet the quality standards necessary for your planned use cases?*

## PROCESSES AND WORKFLOWS

- ☐ **Process medium:**  
*Are the artifacts and data associated with this process primarily physical or digitally based?*
- ☐ **System complexity:**  
*How many different systems are involved in a given process?*
- ☐ **Role complexity:**  
*How many different roles are involved in the process?*
- ☐ **Task quantity:**  
*How many different steps and handoffs are there in a process?*
- ☐ **Process efficiency:**  
*What is the process cycle time and lead time?*

## TECHNOLOGY AND INFRASTRUCTURE

- ☐ **System coverage:**  
*Do you have systems in place to integrate with AI to accomplish the objective?*
- ☐ **Integration availability:**  
*Do your systems use modern API or integration patterns that AI systems require?*
- ☐ **Integration complexity:**  
*How complex are integrations between systems?*
- ☐ **Annual/monthly cost run rate:**  
*Which systems cost you the most?*
- ☐ **Testability:**  
*Do you have a secure sandbox environment to test autonomous agent behavior without risk to live operations?*
- ☐ **Operational sensitivity:**  
*What are potential operational risks you'd introduce with AI?*

## PEOPLE AND CULTURE

- ☐ **Business architecture talent:**  
*Do you have the talent to design and assess the business value of AI agents?*
- ☐ **Technical talent:**  
*Do you have the talent to build and maintain AI agent-based systems?*
- ☐ **End user capability:**  
*What teams need what skills to effectively use AI? What would it cost to train or hire end users?*
- ☐ **Communications:**  
*Do you have a communication plan to inform, educate, and gather feedback?*
- ☐ **Metrics and performance:**  
*How will you adjust KPIs for roles affected by AI?*