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AI Readiness Checklist

A practical checklist for evaluating whether an organization is prepared to adopt AI in a responsible, useful, and operationally realistic way.

Organization / Team	_____
Prepared By	_____
Date	_____
AI Initiative / Use Case	_____

Purpose of This Checklist

AI readiness is not only a technical question. An organization may have access to AI tools or programming talent, but still be unprepared to use AI safely, effectively, or at scale. Readiness depends on strategy, leadership, data quality, workflows, training, governance, security, implementation planning, and performance measurement.

Use this checklist before launching an AI initiative, selecting an AI vendor, assigning internal AI work, automating a workflow, or integrating AI into commercialization, grant support, customer service, operations, research, or knowledge management. The goal is to identify gaps early so that AI adoption supports real organizational value rather than scattered experimentation.

Mark each item as Yes, Partial, or No. Use the notes column to capture evidence, gaps, responsible parties, and follow-up actions.

Status Guide

Yes	Partial	No
This readiness element is clearly addressed and supported by evidence.	Some planning exists, but gaps, uncertainty, or incomplete ownership remain.	This element has not been addressed or needs significant work before implementation.

1. Strategy and Use-Case Clarity

AI adoption should begin with a clear use case, not a general desire to use AI.

Readiness Item	Status Y / P / N	Notes / Evidence	Owner / Next Step
The organization has defined the business, research, commercialization, or operational problem AI is expected to address.			
The proposed AI use case is connected to a strategic priority, not just experimentation.			
Expected benefits have been described in practical terms such as time savings, quality improvement, revenue support, risk reduction, or better decision-making.			
The organization has defined what the AI system should not do and which decisions remain human-owned.			
Leadership has identified the users, teams, or stakeholders who will be affected by the AI initiative.			

2. Leadership, Governance, and Ownership

AI initiatives need visible leadership support and clear responsibility for decisions, oversight, and follow-through.

Readiness Item	Status Y / P / N	Notes / Evidence	Owner / Next Step
An executive sponsor or leadership owner has been assigned to the AI initiative.			
Decision-making authority is clear for tool selection, vendor engagement, budget, data access, and implementation scope.			
A governance process exists for reviewing risks, approvals, changes, and escalation issues.			
Roles are defined for technical staff, business users, data owners, compliance reviewers, and outside advisors.			
Leadership has communicated why the AI initiative matters and how it supports the organization's future direction.			

3. Data Readiness and Knowledge Access

AI performance depends heavily on the quality, structure, permissions, and usability of the data or knowledge sources involved.

Readiness Item	Status Y / P / N	Notes / Evidence	Owner / Next Step
Relevant data sources, documents, or knowledge repositories have been identified.			
Data quality, completeness, consistency, and currentness have been reviewed.			
Data ownership and access permissions are understood.			
Sensitive information, confidential documents, IP, client data, or regulated data have been identified before use.			
The organization has a plan for maintaining, updating, and validating AI-related data over time.			

4. Workflow and Process Fit

AI should be integrated into a workflow that is understood, documented, and realistic for users.

Readiness Item	Status Y / P / N	Notes / Evidence	Owner / Next Step
The current workflow has been mapped before AI is inserted into it.			
The organization understands where AI will support, automate, or change existing work.			
Handoffs between human work and AI-assisted work have been defined.			
Potential workflow bottlenecks, adoption barriers, or unintended consequences have been considered.			
The AI initiative has a realistic implementation path that fits current operating conditions.			

5. People, Training, and Adoption

AI readiness depends on whether people understand the tool, trust the process, and know how their work will change.

Readiness Item	Status Y / P / N	Notes / Evidence	Owner / Next Step
Target users have been involved in planning or feedback before implementation.			
Training needs have been identified for different user groups.			
Staff understand appropriate and inappropriate uses of the AI system.			
Concerns related to job impact, quality, accuracy, accountability, or workload have been acknowledged.			
A communication plan exists to support adoption, expectations, and ongoing feedback.			

6. Security, Compliance, Privacy, and Responsible Use

AI adoption introduces risks that must be addressed before implementation, especially when sensitive data or external tools are involved.

Readiness Item	Status Y / P / N	Notes / Evidence	Owner / Next Step
Security, privacy, confidentiality, and IP considerations have been reviewed.			
The organization has identified whether regulated, client, health, financial, proprietary, or grant-related data may be involved.			
Responsible AI expectations have been defined, including accuracy review, human oversight, and limits on automated decision-making.			
Vendor, platform, or tool terms have been reviewed for data retention, training use, access, and confidentiality concerns.			
The organization has a process for monitoring errors, hallucinations, bias, misuse, or other AI-related risks.			

7. Technical Infrastructure and Implementation Capacity

A useful AI plan must be matched to the organization's actual technical environment and implementation capacity.

Readiness Item	Status Y / P / N	Notes / Evidence	Owner / Next Step
The organization has identified whether the AI solution will be purchased, configured, custom-built, or integrated into existing systems.			
Technical requirements, including integrations, access controls, hosting, APIs, and user management, have been considered.			
Internal or external technical support is available for implementation and troubleshooting.			
The organization has considered pilot testing before wider deployment.			
Budget, timeline, and maintenance responsibilities are realistic for the scope of the initiative.			

8. Metrics, ROI, and Continuous Improvement

Organizations should define what success looks like before implementation and review whether the AI initiative is producing value.

Readiness Item	Status Y / P / N	Notes / Evidence	Owner / Next Step
Success metrics have been defined before implementation begins.			
The organization has a plan for tracking adoption, usage, quality, time savings, cost savings, revenue support, or other outcomes.			
Baseline performance has been identified so improvement can be measured.			
There is a process for collecting user feedback and refining the AI workflow over time.			
Leadership has defined when to continue, expand, pause, or redesign the AI initiative based on results.			

AI Readiness Summary Scorecard

Use this scorecard to summarize the checklist. Count each Yes, Partial, and No by section, then identify the highest-priority gaps to address before implementation.

Readiness Area	# Yes	# Partial	# No	Priority Notes
Strategy and Use-Case Clarity				
Leadership, Governance, and Ownership				
Data Readiness and Knowledge Access				
Workflow and Process Fit				
People, Training, and Adoption				
Security, Compliance, Privacy, and Responsible Use				
Technical Infrastructure and Implementation Capacity				
Metrics, ROI, and Continuous Improvement				

Readiness Interpretation

Strong AI Readiness	Most checklist items are Yes. Proceed with implementation planning, pilot design, and success metrics.
Moderate AI Readiness	Several items are Partial. Address governance, data, workflow, or training gaps before scaling.
Low AI Readiness	Many items are No or unclear. Begin with readiness planning, stakeholder alignment, data review, and risk assessment.
High-Risk AI Adoption	Security, privacy, compliance, ownership, or human oversight questions are unresolved. Do not implement broadly until these are addressed.

Priority Action Plan

List the most important gaps that should be resolved before moving forward with AI adoption or scaling.

Gap / Risk	Impact	Owner	Next Step	Target Date

Discussion Questions

What is the clearest and most valuable AI use case for the organization right now?
Notes: _____

Which readiness gaps could cause the AI initiative to fail, create risk, or produce weak adoption?
Notes: _____

What data, workflow, governance, or training work should happen before implementation?
Notes: _____

Who should own AI oversight, user adoption, and performance measurement?
Notes: _____

What should be piloted first before the organization commits to broader deployment?
Notes: _____

ScienceDocs Change Management and AI Support

ScienceDocs helps startups, research teams, university-linked ventures, and innovation-focused companies plan AI adoption in a practical and responsible way. Our support can include AI readiness review, use-case development, workflow analysis, stakeholder alignment, documentation, implementation planning, and connections to commercialization, grant strategy, optimization engineering, and broader change management needs.

Ready to assess your AI readiness and plan the next step? Contact ScienceDocs to discuss AI adoption, change management, and implementation support for your organization.