



MANAGED AI READINESS

SMB AI Readiness Checklist

A practical assessment for choosing a secure, valuable first AI pilot

Managed AI + Managed IT + Cybersecurity

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Why Readiness Matters

The true value of artificial intelligence for your business hinges on more than the technology itself. It depends on clear workflows, trustworthy data, robust security, defined ownership, and a plan for adoption. This checklist helps you assess whether those foundations are ready for a successful first pilot.

How to Use This Checklist

- **Mark your status:** For each item, select Yes, Not Yet, or Not Sure.
- **Involve key stakeholders:** Gather input from business leaders and IT professionals.
- **Focus on the first pilot:** Use the results to select one manageable AI pilot.
- **Aim for clarity, not perfection:** This is a guide to identify focus areas, not a pass/fail exam.

Business Strategy Scorecard

A successful AI pilot must align with your business objectives.

- ☐ **Named Executive Owner:** Is there a senior leader accountable for the pilot's success?
- ☐ **Documented Business Problem:** Is the business challenge clearly defined?
- ☐ **Baseline Time/Cost/Quality:** Do you have current metrics to measure against?
- ☐ **Measurable Desired Outcome:** Is there a clear, quantifiable goal?
- ☐ **Narrow Pilot Scope:** Is the initial application focused on a specific, limited area?

Workflow Readiness Scorecard

AI thrives on well-defined processes. Evaluate how prepared the target workflow is for AI assistance.

- ☐ **Repeatable Process:** Is the workflow a consistent, repeatable series of steps?
- ☐ **Documented Inputs/Outputs:** Are required inputs and expected outputs understood and documented?
- ☐ **Known Exceptions:** Have common variations and exceptions been identified?
- ☐ **Human Reviewer:** Is there a clear point for human oversight or approval?
- ☐ **Enough Task Volume:** Is there sufficient volume for automation to have measurable impact?

Data Readiness Scorecard

High-quality, well-managed data is the bedrock of effective AI.

- ☐ **Authoritative Sources Identified:** Are the primary data sources clearly identified?
- ☐ **Content Is Current:** Is the data regularly updated and relevant?
- ☐ **Owners Assigned:** Is someone responsible for accuracy and maintenance?
- ☐ **Permissions Understood:** Are access rights and usage permissions defined and enforced?
- ☐ **Sensitive Data Classified:** Has sensitive data, including PII and financial data, been identified and classified?

Security and Governance Scorecard

Protect the organization and its data with clear security and governance controls.

- ☐ **Approved AI Tools List:** Is there a vetted list of permitted tools and platforms?
- ☐ **Acceptable Use Policy:** Does a policy explain how AI may and may not be used?
- ☐ **MFA/Identity Controls:** Are strong identity controls in place for AI systems?
- ☐ **Prohibited Data Rules:** Do employees know what information must not enter AI tools?
- ☐ **Incident Reporting and Logging Plan:** Can AI interactions and potential incidents be logged and reported?

People and Adoption Scorecard

Successful adoption requires clear roles, training, communication, and feedback.

- ☐ **Pilot Users Selected:** Are the pilot participants clearly identified?
- ☐ **Role-Based Training Planned:** Will users receive training appropriate to their roles?
- ☐ **Process Owner Accountable:** Is an owner responsible for the AI-assisted process after the pilot?
- ☐ **Feedback Path Defined:** Can users report problems and suggest improvements?
- ☐ **Change Communication Prepared:** Is there a plan to explain the pilot's purpose and benefits?

Readiness Scoring

Score each item: Yes = 2 points | Not Sure = 1 point | Not Yet = 0 points
Total Score: _____ / 50

Interpreting Your Score

40–50	PILOT READY You have clear objectives, workable processes, secure data practices, and an engaged team. Select and launch a focused pilot.
27–39	PREPARE, THEN PILOT You have a good starting point. Strengthen the business case, workflow, data governance, security, or adoption plan before launch.
0–26	BUILD THE FOUNDATION Establish clear objectives, documented processes, trustworthy data, security controls, and ownership before piloting.

First-Pilot Selector Worksheet

Use this worksheet to evaluate a candidate that is manageable, valuable, and secure.

Candidate workflow/process	
Current effort per week	
Users affected	
Systems/data needed	
Risk level (Low/Medium/High)	
Human approval point	
90-day success metric	

Prioritization Matrix

Plot each candidate based on estimated business value and implementation readiness.

	Higher implementation readiness	Lower implementation readiness
Higher business value	TOP PRIORITY Strong candidates for immediate piloting	PREPARE FOR FUTURE Complete foundational work before piloting
Lower business value	CONSIDER CAREFULLY Possible quick wins with limited strategic impact	DEFER Focus elsewhere until conditions improve

A Practical First 90 Days

- Discover and Baseline (Days 1–15):** Finalize pilot scope and objectives, confirm data access, capture baseline metrics, and identify participants.
- Secure and Design (Days 16–30):** Configure approved tools, define the workflow, prepare data, and finalize roles and permissions.
- Pilot and Train (Days 31–60):** Launch with selected users, deliver training, support adoption, and begin logging results.
- Measure and Decide (Days 61–90):** Compare results with the baseline, gather feedback, evaluate security and ROI, then expand, refine, or retire.

Red Flags That Mean Pause

Pause and reassess if any of these conditions are present:

- ☐ **Unclear Data Ownership:** No one is accountable for the data used by the AI.
- ☐ **Unrestricted Sensitive Data:** Confidential information is used without appropriate safeguards.
- ☐ **No Human Review:** Critical outputs or decisions are fully automated.
- ☐ **No Measurable Outcome:** The pilot lacks a quantifiable success metric.
- ☐ **No Responsible Owner:** No individual is accountable for performance and impact.
- ☐ **High-Impact Decisions Without Oversight:** AI is making significant operational or strategic decisions without governance.

Your One-Page Action Plan

Pilot project title	
Key business objective	
Primary data source(s)	
Chosen AI tool(s)/platform(s)	
Critical security controls	
First 30-day goals	
Business leader	
IT leader	
Pilot users	

Ready to turn your score into a secure AI roadmap?

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This checklist is for educational and self-assessment purposes and does not constitute legal or regulatory advice.