

AI Readiness Worksheet

5 Questions Before You Adopt an AI Tool

AI can create real opportunities for your business - but it's not the right solution for every challenge. Use this worksheet to evaluate one specific AI use, understand the opportunities and risks, and decide on the best next step.

HOW TO USE THIS WORKSHEET

- Choose one specific AI use or tool you are considering.
- Work through the five questions.
- Review the overall assessment and next steps.
- Use the pilot plan to put your decision into action.

About the Proposed AI Use

AI tool or solution:

What do you want to use it for?

Department/team:

Who will use it?

Date:

"The goal isn't to use AI. The goal is to solve a business problem, improve a process or create an opportunity."

1. What problem are we actually trying to solve?

Start with the business problem, not the tool. Be clear about the outcome you want to achieve.

What is the current challenge or opportunity?

What outcome are we trying to improve?

How will we know if it's successful?

THINGS TO CONSIDER

- What is frustrating our employees or customers?
- Where are we losing time?
- What would success look like?
- Is AI the best solution, or is there a simpler answer?

2. What repetitive work is taking up our time?

Identify tasks that are repetitive, time-consuming and relatively low-risk.

What tasks could AI assist with?

How much time do these tasks currently take?

What would we do with the time saved?

THINGS TO CONSIDER

- Look for routine, repetitive work such as drafting emails, summarizing documents, brainstorming ideas, or organizing information.
- Start with lower-risk tasks.
- Think "first draft" - AI can help you get started, but it may not be the final product.

3. What information would we be giving the AI?

Identify what the tool would receive. Sensitive, confidential, regulated, customer, employee, financial, or proprietary information deserves special scrutiny.

Information/data entered:

Sensitive/confidential data involved?

Who checks privacy/security terms?

THINGS TO CONSIDER

- Avoid entering sensitive or confidential information into public or free AI tools.
- Review the tool's privacy policy and data usage terms.
- Consider whether a business or enterprise version is needed for stronger data protections.
- Be aware of legal, regulatory or contractual requirements involving customer data, health information, financial records, or proprietary information.

4. Where does a human still need to make the decision?

Determine what will require human review, judgment or approval, and what the AI can do on its own. The higher the potential impact, the more important human oversight becomes.

What will the AI do independently?

What will a person review or approve?

Who is responsible for the final decision?

THINGS TO CONSIDER

- AI can assist with the work, but a person remains responsible for the result.
- Be especially cautious with decisions involving people, finances, legal matters, safety, or customer commitments.
- Establish a review process for AI-generated content before it is used externally.

5. Who is responsible for how we use AI?

Clarify who will own, oversee and monitor this AI use within your business.

Who will own this AI use?

Who will monitor ongoing use?

How will we measure success?

THINGS TO CONSIDER

- Determine which tools are approved for business use.
- Establish basic guidelines for acceptable use.
- Plan for ongoing review to ensure the tool is still appropriate and providing value.

Overall Assessment

Based on your answers, which option best describes where you are right now?

☐ PROCEED

Low risk, clear value, and appropriate safeguards in place.

☐ PROCEED WITH SAFEGUARDS

Potential value, but additional safeguards or clarification are needed.

☐ NOT YET

Too many risks or outstanding questions at this time.

Next Steps / Simple Pilot Plan

If you're moving forward (or proceeding with safeguards), outline your next steps.

What will we do first?

Who is responsible?

Timeline:

How will we measure success?

Important: This worksheet is an educational self-assessment and starting point. It is not a certification of AI safety or readiness and does not replace professional legal, privacy, cybersecurity, HR, or other advice appropriate to your business.