

AI READINESS CHECKLIST

A practical starting point for safer, smarter AI adoption.

HOW TO USE Select one answer per statement. Yes = 2 pts | In Progress = 1 pt | No = 0 pts

ORGANIZATION

DATE

01 Strategy & Goals

YES

IN PROGRESS

NO

01 We have identified specific problems AI could help solve.

☐
☐
☐

02 We have clear goals for AI, such as efficiency, service, or reporting.

☐
☐
☐

03 Leadership agrees on why we are exploring AI.

☐
☐
☐

02 Data & Documentation

YES

IN PROGRESS

NO

04 Our important data is organized, accurate, and accessible.

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☐
☐

05 We know which documents, systems, and records AI may interact with.

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☐
☐

06 We know what information must not be shared with public AI tools.

☐
☐
☐

03 Security & Compliance

YES

IN PROGRESS

NO

07 We have a security policy or rules covering AI use.

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☐
☐

08 We have reviewed privacy, compliance, and records-retention needs.

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☐
☐

09 Sensitive systems use appropriate permissions and access controls.

☐
☐
☐

10 We have a process to assess AI vendors before adoption.

☐
☐
☐



04 Technology & Infrastructure

YES

IN PROGRESS

NO

- | | | | | |
|----|--|-----------------------|-----------------------|-----------------------|
| 11 | Our Microsoft 365 or Google Workspace environment is well managed. | ☐ | ☐ | ☐ |
| 12 | We know which existing systems could integrate with AI tools. | ☐ | ☐ | ☐ |
| 13 | We have a strong baseline for MFA, device security, and backups. | ☐ | ☐ | ☐ |

05 Team Readiness

YES

IN PROGRESS

NO

- | | | | | |
|----|--|-----------------------|-----------------------|-----------------------|
| 14 | Staff understand the basic opportunities and risks of AI. | ☐ | ☐ | ☐ |
| 15 | We have identified an internal owner for AI-related decisions. | ☐ | ☐ | ☐ |
| 16 | We can train employees to use approved AI tools responsibly. | ☐ | ☐ | ☐ |

06 Governance & Next Steps

YES

IN PROGRESS

NO

- | | | | | |
|----|--|-----------------------|-----------------------|-----------------------|
| 17 | We have or are drafting acceptable-use guidelines for AI. | ☐ | ☐ | ☐ |
| 18 | We have a plan to test AI with a small, controlled pilot. | ☐ | ☐ | ☐ |
| 19 | We know how we will measure usefulness, cost, and results. | ☐ | ☐ | ☐ |

YOUR AI READINESS SCORE

Add your points from all 19 questions (maximum 38).

TOTAL

/ 38

30–38 Plan a controlled pilot

Strong starting point; validate safeguards first.

19–29 Close readiness gaps

Prioritize data, policy, security, and staff training.

0–18 Strengthen the basics

Start with governance and core IT/security practices.

IMPORTANT A score is not a compliance certification. Address any security or privacy "No" before using sensitive data in AI systems.

WONDERING WHAT TO DO NEXT?

Black Rock Technologies can help evaluate your AI opportunities, risks, and next steps.

Start a conversation at black-rock.tech