AI readiness checklist

By AJ Awan, Flowtivity | Updated 28 October 2026 | Version 1.0

For a business owner, manager and the person who does the work. The homepage self-check helps you identify a first preparation step. This worksheet takes that result further: record evidence, gaps, owners and a decision for one candidate task.

Spend 15 minutes preparing the first record together. You do not need to select software or upload business records. Write down unknowns and assign follow-up work. This is a planning aid, not a business-wide readiness score, certification or approval to use live data.

How to use it in 15 minutes

1. Minutes 0 to 3: name one task, its owner and the gap found in the self-check.
2. Minutes 3 to 10: mark the five checks Ready, Gap or Unknown, and note the evidence.
3. Minutes 10 to 13: describe a small test and the person who will review it.
4. Minutes 13 to 15: choose a next action, assign each gap and set a review date. Unresolved permissions or safety questions pause live testing.

Use public or fictional examples while permissions are unresolved. A completed worksheet does not establish legal compliance or predict a return.

1. Start with your self-check result

Bring the first preparation step from the existing self-check, if you used it. Record one task only, including the awkward cases. If a simple rule, software setting or process change could solve the problem, keep that option in the comparison.

Business or team, date and participants

Candidate task and process owner

First gap or next step from the homepage self-check

What starts the task, and what counts as finished?

Current tools, task frequency and main exceptions

Problem to improve and useful result

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2. Check the foundations and record evidence

Mark each row Ready, Gap or Unknown. Ready means the recorded arrangement is supported by evidence for this specific task. It does not approve the entire project. Name a follow-up owner wherever evidence is missing.

Check and evidence to collect	Status / evidence / owner
Information: locate a current source and representative routine, incomplete and difficult examples. Identify personal, confidential or restricted content and who owns it. Check whether it is accurate enough for this use.	Ready / Gap / Unknown Evidence: _____ Owner: _____
Access and permission: confirm authority to use the information in the proposed tool. Record the account, provider terms and settings, allowed connectors, least access required, storage/deletion arrangements and how access is removed.	Ready / Gap / Unknown Evidence: _____ Owner: _____
People and skills: name the task owner, reviewer and backup. Confirm they understand common failure modes, can compare outputs with sources, have time to check work and know who can pause the workflow.	Ready / Gap / Unknown Evidence: _____ Owner: _____
Candidate task: define a small, reversible change, its boundaries and exceptions. Confirm why AI is useful compared with a simpler option. Exclude decisions needing a qualified person from automatic action.	Ready / Gap / Unknown Evidence: _____ Owner: _____
Review points: record the baseline, success and stop conditions, budget, costs including review time, test cases, review date and manual fallback. Decide who may approve the next stage.	Ready / Gap / Unknown Evidence: _____ Owner: _____

3. Scope the first task before connecting anything

Begin with a bounded exercise using public or fictional material. Moving to live records, wider access or external actions is a separate decision. Use enough representative cases to examine routine work and likely exceptions; there is no universal sample size that proves a workflow safe.

Proposed change, intended output and who uses it

Inputs allowed and information excluded

Tool/account to assess, permissions allowed and actions blocked

Reviewer, backup and exact checks before use

Manual fallback and person authorised to pause

Setup/software budget, staff review time and spending limit

Start date, end date and decision owner

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4. Prepare cases and review points

Choose examples without exposing restricted information. Describe the expected behaviour before running the test. An unclear or unsupported result should go to a person, not become a confident external answer.

Case	Expected handling	Observed result / reviewer
Routine, complete input	Produces the defined draft; reviewer checks sources and required fields.	_____
Missing or unclear input	Identifies the gap and asks a person rather than inventing a detail.	_____
Wrong, contradictory or outdated source	Flags uncertainty and withholds an unsupported action.	_____
Excluded information or requested action	Stops or routes to the named person without disclosure or action.	_____
Tool unavailable or output unsuitable	Manual fallback works; the team can continue the task.	_____

5. Compare the whole task, including checking

Use comparable cases and the same definitions before and during the trial. Include time spent checking, correcting and handling exceptions. Record the denominator when counting errors or successful cases. Do not convert a faster draft into an assumed labour saving.

Measure	Current process	Trial / review note
Comparable cases and period	_____	_____
Total staff time, including checking and rework	_____	_____
Corrections or unacceptable outputs, out of cases reviewed	_____	_____
Turnaround or service quality measure	_____	_____
Software, setup and other costs	_____	_____
Exceptions, complaints or incidents	_____	_____

Continue only if these conditions are met

Pause immediately if these conditions occur

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Review date, reviewer and evidence location

6. Decide the next preparation step

Situation	Next action
Task or information is unclear	Map an example and resolve the source or quality gap before selecting a tool.
Permission, security or reviewer is unresolved	Pause live use. Assign the issue and work with public or fictional examples only.
Checks and boundaries are evidenced	Ask the authorised owner to approve a limited test with review and fallback. Checking boxes is not approval.
The trial fails its conditions or creates unacceptable risk	Stop or revise. Record what happened and what must change before any retest.
The trial meets agreed conditions	Record the evidence and decide whether to continue within scope. Expansion needs its own review.

Decision: prepare more / approve bounded test / revise / stop

Reasons, evidence, conditions and unresolved questions

Gap or action 1: owner and due date

Gap or action 2: owner and due date

Decision owner, signature and date

Next review date and changes that trigger an earlier review

Worked example: draft a routine enquiry reply

Illustrative only. This fictional example describes a planning decision, not an achieved result or a prediction of savings.

Worksheet item	Example entry
Task and self-check gap	Office team drafts opening-hours replies. The first gap is knowing which information may enter the tool.
Information and access	Use the public opening-hours page and fictional enquiries. Customer messages and inbox connection remain excluded.
People and task boundary	Office manager reviews every draft. AI cannot send messages, change bookings or make an exception to business hours.
Test cases	Normal hours question; missing date; public holiday not listed; request containing personal details; tool unavailable.

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Worksheet item	Example entry
Measures	Record total drafting plus review time, corrections and unresolved cases for the same types of enquiry. No benefit claimed before measurement.
Decision	Prepare a fictional-data exercise. Ask the information owner to resolve any proposal to use live customer enquiries separately.
Review	Office manager records outcomes and decides whether more preparation is needed before requesting a live pilot.

Where a person must decide

- The information owner and appropriate advisers establish permission and acceptable handling, rather than relying on a readiness tick.
- The process owner chooses a worthwhile task and decides whether a simpler change would work.
- The reviewer checks outputs, resolves exceptions and has authority to pause the task.
- The authorised owner weighs the evidence, cost and risk before approving a trial, continuing or expanding it.

Sources and further guidance

National AI Centre: Guidance for AI adoption, foundations

Official guidance for early and low-risk use, including accountable owners, testing, monitoring and human control.

OAIC: Guidance on privacy and the use of commercially available AI products

Official guidance for assessing products and handling personal information. Its legal requirements depend on your organisation and use.

ASD's ACSC: Artificial intelligence for small business

Security guidance on vendor checks, data handling, unreliable outputs and staff awareness.

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Want help putting this in place?

Bring one recurring task and the first unresolved item in your worksheet. A process description is enough for an initial conversation; keep business records and personal information out of it.

Book a free consultation