
The AI Readiness Checklist

Fifteen yes/no questions across five areas — data rules, current usage, knowledge hygiene, ownership, and workflow candidates. Ten minutes with your leadership team and a clear read on where you stand.

PREPARED BY

Brad Taylor
Fractional Chief AI Officer

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ON THE WEB

bradtaylorai.com



How to run it

This is a ten-minute exercise for a leadership meeting, not a survey to circulate. The value is in what the room says out loud — and in where it disagrees.

Who's in the room

The leadership team — the CEO or managing partner, plus whoever owns operations, finance, and clients. Not IT alone: most of these questions are about ownership, money, and habits, not infrastructure. Have someone note where the room disagrees — a split vote is a finding in itself.

The ten-minute protocol

1. Read each question aloud, in order.
2. Answer yes only if you could prove it to an outside advisor today.
3. Count the yeses.
4. No partial credit. "Sort of" is a no.

The proof standard

A "yes" you could not prove is a no. The checklist only works if it hurts a little — a flattering score costs you the one thing this exercise buys: an honest starting point.



The five areas



Data rules

What can never leave the building — and whether anyone would notice if it did.



Current usage

Where AI is already being used in your company, sanctioned or not.



Knowledge hygiene

Whether a system could find the current version of the truth in your documents.



Ownership

Whether one name — not a committee — is attached to AI decisions, and whether that name has decided anything lately.



Workflow candidates

Whether you know which three workflows eat the most expert hours — with numbers, not vibes.

The fifteen questions

Count your honest yeses. Every question is answerable in one leadership meeting — if a question starts a debate, that's a no.

Data rules

QUESTIONS 1-3

- 1. Do you have a written rule for what data can never go into a public AI tool?**
A rule that lives in one leader's head is a preference, not a rule.

- 2. Could every employee name the categories that are off-limits — client financials, privileged material, patient or proprietary data?**
If the answers differ around the table, the rule doesn't exist yet.

- 3. Has anyone checked what your current vendors' AI features already do with your data?**
AI features ship switched on; nobody sends a memo when the data terms change.

Current usage

QUESTIONS 4-6

- 4. Do you know which AI tools your team actually used this week, sanctioned or not?**
The honest answer at most companies is a guess.

- 5. Is there an approved-tools list people can find without asking?**
"Ask IT" is not a list.

- 6. If an employee pasted client data into a chatbot today, would you ever find out?**
"Probably not" is a no.


Knowledge hygiene

QUESTIONS 7-9

- 7. Could a new hire — or a new system — find the current version of your ten most important documents?**
The new hire can ask around. The system can't.

- 8. Does every critical document have a named owner who keeps it current?**
"Whoever edited it last" is not an owner.

Knowledge hygiene continues on the next page →

 **Knowledge hygiene** · continued

QUESTIONS 7-9

9. Is there one place company knowledge is supposed to live, and does anyone believe it?
"Mostly in the wiki, partly in email" is a no.

 **Ownership**

QUESTIONS 10-12

10. Is there one name — not a committee — attached to AI decisions?
"The leadership team owns it" means nobody does.
11. Does that person report AI progress to leadership on a fixed cadence?
A fixed cadence is what separates an owner from a title.
12. If an AI tool breaks a workflow, is it clear who owns the fix?
If the answer is "the vendor," that's a no.

 **Workflow candidates**

QUESTIONS 13-15

13. Can you list the three workflows that consume the most expert hours?
Name them now, out loud. Hesitation is data.
14. Do you know what an hour of those experts' time actually costs you?
Loaded cost — not salary math on a napkin.
15. Has any AI pilot you've run been measured against a number you'd defend to your board?
"The team likes it" is not a number.

Your score: _____ of 15

Count your honest yeses. No partial credit — and if a question started a debate, that's a no. Then turn the page.



How to read your score

Three bands. Most leadership teams land in the middle one.

12-15 YES You're readier than most

The question isn't whether to move — it's sequencing: which workflow first, and who owns the roadmap.

6-11 YES The most common band

You have real foundations and real gaps; this is exactly what the AI Executive Assessment is built to score and sequence.

0-5 YES You have shadow AI, not an AI strategy

Start with data rules and a single owner — before any tool decision.

What the bands don't tell you

This checklist measures what the room believes it could prove. It tells you where you stand; it won't tell you which workflow to automate first, what that's worth in dollars, or what your staff actually do with AI when nobody's asking. Those answers come from evidence, not a show of hands.

When you want evidence instead of self-assessment

The AI Executive Assessment is the two-week, fixed-price version of this conversation: the same five areas, examined against your usage data, your documents, and your numbers instead of hands around a table. If today's exercise stung, that's the next step.

bradtaylorai.com/how-i-work · brad@bradtaylorai.com