

AI Readiness Checklist

A practical check of whether one business workflow is ready for a governed AI agent, where the agent prepares the work and people approve what matters. Tick each item that is true today. Items you cannot tick are what to fix first.

1. The workflow

- ☐ The workflow is written down step by step, including who does each step today.
- ☐ It happens often enough (weekly or more) for automation to be worth the effort.
- ☐ Most cases follow a repeatable pattern; exceptions can be described.
- ☐ There is a named business owner who will make decisions about it.

2. Data and systems

- ☐ The information the workflow needs is available in systems or documents you control.
- ☐ You know which systems an agent would read from, and which (if any) it would write to.
- ☐ Access can be given through an API, report, export or read-only view.
- ☐ Data quality is good enough that a person could do the task from the same inputs.

3. Rules and judgement

- ☐ The business rules and policies behind the workflow are documented or can be.
- ☐ You can say which decisions must always be made by a person.
- ☐ You know what should happen when information is missing or unclear.

4. Risk and governance

- ☐ Security, privacy and compliance owners know about the idea and can review it.
- ☐ You have agreed what the agent may never do (for example send payments, change prices or contact customers without review).
- ☐ Every action and approval can be logged for audit.
- ☐ There is a way to pause the agent and fall back to manual handling.

5. People and change

- ☐ The team doing the work today is involved and understands what will change.
- ☐ Someone is responsible for reviewing agent outputs during the pilot.
- ☐ Training time for reviewers and approvers has been planned.

6. Measurement

- ☐ You have a baseline: current volume, handling time, error or rework rate.
- ☐ You have agreed two or three measures that will show whether the pilot worked.
- ☐ You have decided in advance what result would justify extending, changing or stopping.

How to read your result

Most items ticked: the workflow is a good candidate for a pilot with human approval steps.

Gaps in sections 1-3: document the process and rules first; an agent will struggle without them.

Gaps in sections 4-6: the idea may be sound, but agree governance and measures before building.

Want a second opinion?

Book a free 30-minute AI opportunity review and we will go through one workflow with you:

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