

AI READINESS CHECKLIST

Is your business ready for AI?

A 20-question checklist for CEOs, COOs, and operations leaders who want AI to improve real workflows, not create another disconnected experiment.

Use this before you buy another AI tool.

AI works when your data, systems, workflows, and review process are ready. This checklist helps you find the first workflow worth improving.

The goal is not a perfect score.

The goal is to spot the gap: messy data, unclear ownership, disconnected systems, weak review steps, or a workflow that should stay human for now.

If you answer "no" or "not sure" several times, you are not behind.

You have found the real starting point.

How to use this

For each question, mark **Yes**, **No**, or **Not sure**. If the answer is unclear, mark "Not sure." That is useful information.

1. Workflow readiness

- 1 Can you name one workflow where faster intake, triage, reporting, quoting, drafting, or follow-up would save meaningful time every week?
- 2 Is that workflow stable enough that two employees would describe it the same way?
- 3 Do you know where the work starts, who touches it, and where it ends?
- 4 Are the exceptions understood, or does the workflow depend on one person knowing what to do when things get weird?
- 5 Is there a clear point where a person can review and approve AI-assisted work before it affects a customer, patient, order, invoice, or legal document?

2. Data readiness

- 6 Do you know which system is the source of truth for the workflow?
- 7 Is the data accurate enough that employees trust it today?
- 8 Is the data structured, or is it mostly buried in emails, PDFs, Word documents, spreadsheets, screenshots, or people's heads?
- 9 Do your systems agree with each other, or do employees regularly copy, retype, or reconcile data by hand?
- 10 Can you separate the data AI is allowed to read from data it should not touch?

3. System readiness

- 11 Can the systems involved be accessed through an API, database, export, or controlled integration?
- 12 Do you know who owns each system and who can approve access?
- 13 Are user roles and permissions defined well enough to prevent broad access to sensitive information?
- 14 Is there a way to log what the AI workflow reads, writes, recommends, or changes?
- 15 If the AI workflow fails, can the team fall back to the current process without stopping the business?

4. Risk and accountability

- 16 What happens if the AI is wrong? Is the cost low, moderate, or serious?
- 17 Does the workflow touch customer, patient, financial, employee, legal, or privileged data?
- 18 Do you know which employee or role is responsible for reviewing AI output?
- 19 Do you have a rule for what AI may draft, what it may recommend, and what it may never do without approval?
- 20 Would leadership know how to measure whether the AI project paid for itself after 90 days?

Scoring

Result	What it means
15–20 yes answers	You likely have at least one workflow ready for an AI implementation assessment.
8–14 yes answers	You may be close, but the first project should include workflow mapping, data cleanup, or permission design.
0–7 yes answers	Do not start with an AI agent. Start by finding the workflow and data foundation first.

Pick one workflow to examine first

Question	Your answer
What workflow do we want to improve?	
Who does the work today?	
What data does the workflow need?	
Which systems are involved?	
What needs human approval?	
What would make this worth doing in 90 days?	

Bring in Zelifcam if...

- You know AI could help, but you do not know where to start.
- Your best data is trapped in old systems, spreadsheets, PDFs, email, or disconnected apps.
- Employees are already using AI informally and you need guardrails.
- You need AI connected to real business workflows, not just a demo.

What we do next

Zelifcam maps your workflows, data sources, systems, and risks, then identifies the first AI project worth building.

Book an AI readiness session:

calendly.com/zelifcam/discovery-session