

AI Readiness Assessment Worksheet

A cross-functional worksheet for moving from mandate to evidence-based decision.

INTELLIGENT SYSTEMS. PRACTICAL RESULTS.

How this asset operates

Funnel stage	Consideration
Audience	Leadership teams prioritizing AI initiatives
Trigger	An AI mandate or backlog exists without agreed priorities
Objective	Document operating readiness across strategy, workflow, data, technology, risk and ownership
Primary CTA	Use the gaps to define readiness work
Delivery method	PDF worksheet or facilitated session
CRM action	Record readiness interest and next decision; do not store sensitive responses in marketing analytics
Follow-up	Readiness-sprint briefing when appropriate
Compliance	General planning tool; not professional advice or approval.
KPI	Completed worksheets and qualified readiness engagements

Complete this with representatives from operations, technology, users, security/privacy and finance. Separate facts from assumptions.

Business context

Priority business outcome

Why now

Affected teams and users

Executive sponsor

Decision required and date

Workflow readiness

Is the workflow bounded from trigger to outcome?

Are high-volume paths and exceptions understood?

Can current performance be measured?

Will users participate in design and testing?

Data and technology

What data is required and who authorizes it?

Which systems must be integrated?

Which vendor or architecture constraints apply?

What must remain outside the system?

Risk and governance

What harm can result from error or misuse?

Which actions require human approval?

What privacy, security, legal or contractual review applies?

How will incidents, audit and change be handled?

Operating model

Who owns the system after launch?

Who monitors quality and cost?

Who can approve changes and releases?

What budget and capacity exist for operation?

Readiness conclusion

Strongest evidence

Material gaps

No-go conditions

Recommended next step

Owner and due date

Decision record and limitations

Decision or conclusion

Evidence supporting the decision

Material limitations and assumptions

Accountable owner

Review date

Important

General planning tool; not professional advice or approval.

PlanckCyber resources are general planning tools. They do not create a client relationship or substitute for qualified legal, privacy, security, financial, accounting, engineering, regulatory or procurement review.