AI Transition Checklist

Use this checklist to evaluate whether your workflows, data, team, and systems are ready for AI. Check each item as you go. The goal is to build clarity before you invest in tools.

1. Business Objectives

Done	Checklist Item
☐	We can describe the business problem we want AI to help solve.
☐	We know which workflow or process we want to improve first.
☐	We can explain what success would look like in measurable terms.
☐	We are not choosing a tool before defining the problem.

2. Workflow Clarity

Done	Checklist Item
☐	We have mapped the current process step by step.
☐	We know where work gets delayed, repeated, or dropped.
☐	We understand who owns each handoff and decision point.
☐	We have identified which parts of the process are repeatable enough for AI.

3. Data Readiness

Done	Checklist Item
☐	We know which data sources the process depends on.
☐	We have identified duplicates, gaps, or inconsistent records.
☐	We trust the key fields AI would use most.
☐	We know who is responsible for keeping the data accurate.

4. Systems and Integration

Done	Checklist Item
☐	We know which systems need to connect for AI to work well.
☐	We understand where information currently breaks between tools.
☐	We have identified manual copy-and-paste steps we want to reduce.
☐	We know whether the first use case can be handled with existing systems.

5. Governance and Risk

Done	Checklist Item
☐	We have decided which data should never be entered into AI tools.
☐	We know where human review is required before output is used.
☐	We have assigned ownership for AI decisions, approvals, and oversight.
☐	We have basic rules for tool usage, validation, and escalation.

6. Team Readiness

Done	Checklist Item
☐	The people involved understand why this workflow is being improved.
☐	The team knows where AI fits and where it does not.
☐	We are prepared to train staff on practical day-to-day usage.
☐	We expect feedback and refinement instead of instant perfection.

7. Pilot Planning

Done	Checklist Item
☐	We have chosen one focused use case for the pilot.
☐	We know how we will measure time saved, quality improved, or cost reduced.
☐	We have defined who reviews the output and how feedback is captured.
☐	We have a clear point at which we will decide whether to expand or revise.

8. Scaling Readiness

Done	Checklist Item
☐	We are willing to improve the workflow before scaling AI further.
☐	We have a plan to document standards once the pilot works.
☐	We know how we will keep measuring results after launch.
☐	We understand that AI adoption is an operational change, not just a software purchase.

What your results mean

Score Range	Interpretation
0-10	You are still in the early readiness stage. Focus on workflow mapping, data cleanup, and process clarity before testing tools.
11-20	You likely have one or two solid starting points. A focused pilot may be possible if the use case is narrow and low risk.
21-28+	You are in a strong position to run a structured AI pilot and begin building repeatable operating standards.

Need help finding the right starting point?

Book an AI Readiness Assessment at blaserconsulting.com