AI Sherpa

Platform agnostic · Secure by design · Results focused

AI READINESS CHECKLIST

Is your team ready to use AI safely?

A quick self-check for growing and mid-market teams. It takes about ten minutes and shows where to start, before you roll AI out to everyone.

How to use it: tick each statement that is true for your business today. Be honest, a blank box is useful information. Then count your ticks and read "How did you do?" below.

1 Goals and use cases

- [ ] We can name two or three real tasks where AI could save time, like reports, proposals or follow-ups.
- [ ] Leadership agrees on why we are adopting AI and what a good first win looks like.
- [ ] We know how we will judge a pilot: time saved, quality, or fewer errors.

2 Data and access

- [ ] We know where the documents and data for those tasks live.
- [ ] File and folder permissions are current, so people and AI tools only see what they should.
- [ ] We know which information must never go into an AI tool, such as customer, financial or personal data.

3 Security and governance

- [ ] We have a written AI usage policy, even if it is one page.
- [ ] Someone owns AI decisions: approving tools, answering questions and updating the policy.
- [ ] We know which AI tools people already use, including free personal accounts.

4 People and training

- [ ] Staff have had practical guidance for their role, not just a login.
- [ ] We have a few go-to prompts or examples for our most common tasks.
- [ ] Everyone knows a person reviews AI output before it reaches a customer.

5 Tools and platforms

- [ ] We chose tools based on where our work already lives, like Microsoft 365 or Google Workspace.
- [ ] We use business accounts with admin controls, not personal ones.
- [ ] We know what our current licenses already include before we buy more.

HOW DID YOU DO?

Count your ticks, then find your starting point.

My ticks: _____ of 15

12 TO 15 TICKS

Ready to pilot

You have a solid base. Pick one use case, run a small pilot with clear guardrails, and decide up front how you will measure it.

7 TO 11 TICKS

Close the gaps first

A very common place to be. Fill the blanks in Data and access and in Security and governance before you widen access.

0 TO 6 TICKS

Start with the basics

That is normal early on. Agree on two goals and write a one-page usage policy. Those two steps make everything after them easier.

This is a conversation starter, not a score. A blank box in sections 2 or 3 usually matters more than one in section 5.

FREE 15-MINUTE INTRO CALL

Want a second opinion on your answers?

Email us and we will set up a short call. We will talk through your checklist and suggest a practical first step. No obligation, no sales pitch.

info@aisherpa.cloud
Subject: AI readiness checklist

We see many customers improve their operations by increasing productivity, reducing costs, and growing revenue. We are happy to walk through specifics on a call.