

AI Readiness Checklist for SMEs

Evaluate your organisation across the five dimensions of AI readiness before committing budget to tools, platforms, or pilots. Understand your ceiling — and what to fix first.

5 Readiness Dimensions

Self-Assessment

Executives & Leaders

HOW TO USE THIS CHECKLIST

Work through each dimension with your leadership team. Check each item your organisation can honestly confirm.

Count your checks per section and total at the end.

SCORING GUIDE

Each checked item = 1 point. Total possible = 25. Items marked **Critical** should be addressed before any AI initiative begins regardless of total score.

AFTER YOU SCORE

Book a free 30-minute AI Readiness Consultation at denagenticai.com/ai-readiness-consultation — we'll walk through your results and recommend a starting point.

1

Strategy

Does your organisation have intentional, business-connected AI goals?

SECTION SCORE

/ 5

- AI is connected to at least one specific business priority** CRITICAL
e.g. reducing service response time, improving proposal quality, cutting manual reporting hours
- A named leader or sponsor has accountability for AI decisions**
Someone is responsible for approving tools, setting policy, and reviewing results
- You have identified at least 2–3 specific AI use cases to prioritise** IMPORTANT
Not a general interest in AI — specific tasks, workflows, or departments where AI will be applied
- Budget or resource allocation for AI has been discussed or approved**
Even a modest dedicated budget signals strategic intent over ad-hoc experimentation
- Leadership has discussed how AI success will be measured**
Time saved, error reduction, revenue impact, faster decisions — at least one metric per initiative

2

Data Quality

Is your data, knowledge, and information infrastructure AI-ready?

SECTION SCORE

/ 5

- Core business data is accessible in a structured, consistent format** CRITICAL
Not scattered across spreadsheets, email attachments, or locked in disconnected systems
- Key business metrics have agreed, consistent definitions across teams** IMPORTANT
"Revenue", "customer", "lead" mean the same thing in every system and to every team

Internal policies, SOPs, and procedures are documented and findable
Not just "in people's heads" — actual written documents your team can locate and AI could reference

Your key business systems can share data or have accessible APIs
CRM, ERP, finance, and operations systems can be connected — or data can be extracted regularly

Someone is responsible for data quality and data management
A named person or team who owns data accuracy, consistency, and maintenance

3

Talent & Skills

Does your workforce have the capability to work effectively alongside AI tools?

SECTION SCORE

/ 5

- Key staff understand what AI tools can and cannot do** CRITICAL
They know about hallucination, bias, and verification — not just "AI is impressive"
- At least some team members can write effective prompts** IMPORTANT
They can use the 5 prompt elements (Task, Context, Audience, Constraints, Format) consistently
- Staff know how to review and verify AI outputs before using them**
They apply the four verification questions: useful, accurate, complete, safe to use?
- Leadership has a clear understanding of AI's strategic implications**
Executives can evaluate AI use cases, understand governance requirements, and assess ROI
- There is a plan or appetite for structured AI capability building**
Training programmes, workshops, or learning resources are being considered or in progress

4

Governance & Risk

Are there guardrails, policies, and accountability structures in place for AI use?

SECTION SCORE

/ 5

- You have (or are building) a written AI use policy** CRITICAL
Covering acceptable use, approved tools, what data can be shared, and output review requirements
- Someone reviews high-stakes AI outputs before they are acted upon** IMPORTANT
Legal, HR, financial, or customer-facing decisions have a human review checkpoint
- Staff know what client or internal data they are not allowed to enter into AI tools**
Privacy rules and confidentiality requirements are understood and enforced — not assumed
- There is an escalation path when AI produces problematic or uncertain output**
Staff know who to contact — they don't have to guess whether to use or discard a result
- AI tool selection involves evaluation, not just individual adoption**
Tools are assessed for security, data handling, compliance, and fitness before org-wide rollout

5

Tools & Technology

Is your technology environment capable of supporting meaningful AI adoption?

SECTION SCORE

/ 5

- Your core systems are cloud-based or have accessible data exports** IMPORTANT
Legacy on-premise systems with no API access significantly limit AI integration options
- You have evaluated or trialled at least one AI tool in a real work context**
Beyond one-off experiments — actual use in a real workflow or task for at least 2 weeks
- IT or technology leadership is involved in AI tool decisions**

Security, integration, and data handling are reviewed — not just the user experience

You understand the difference between general AI assistants and grounded AI systems

Teams know when a general tool is sufficient vs when AI needs to be connected to internal data

You manage AI tools as a portfolio — not a collection of individual purchases

There is visibility into what tools are in use across teams, at what cost, and with what outcome

SCORE SUMMARY

**IMPORTANT: IDENTIFY YOUR CEILING DIMENSION**

Your total score matters less than your **lowest-scoring dimension**. The dimension where you scored lowest is your "ceiling" — it limits the sophistication of AI initiative you can safely pursue, regardless of how strong the other dimensions are. Fix the ceiling first.

WHAT YOUR SCORE MEANS

Score 0 – 9**Foundation Stage**

Significant gaps in at least 2–3 dimensions. Focus on governance, data structure, and leadership alignment before any tool investment. Start with the Diagnostic engagement.

Score 10 – 17**Emerging Stage**

Some foundations are in place. Identify your ceiling dimension and address it. Q1 initiatives (internal, AI-assists) are appropriate. Structured training and governance policy are the priority.

Score 18 – 25**Operational Stage**

Strong foundations across most dimensions. Q2–Q3 initiatives are appropriate. Focus on use-case prioritisation, ROI measurement, and beginning workforce redesign for AI-augmented roles.

NOTES — KEY GAPS & PRIORITIES IDENTIFIED

READY FOR A DEEPER ANALYSIS?**Book a Free 30-Minute AI Readiness Consultation**

Tariq personally reviews your checklist results, maps your organisation to the full AI Capability Maturity Model, and recommends a clear starting point.

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/ai-readiness-consultation