

AI Tooling Readiness Checklist

Northline Consulting | For 5-40 person product & ops teams

Score each item 0-2 (0 = no, 1 = partial, 2 = yes). Total out of 20.

1. Do we have a clear list of the top 3 workflows that burn the most staff hours?
Score: [0] [1] [2]
2. Is sensitive data (customer PII, secrets, contracts) already classified for what can/can't go into AI tools?
Score: [0] [1] [2]
3. Do we have one owner for AI tooling decisions (not "everyone experiments")?
Score: [0] [1] [2]
4. Can we name the stack we already pay for (chat, coding, support, CRM) and what's overlapping?
Score: [0] [1] [2]
5. Have we piloted AI on one real task with a before/after time or quality measure?
Score: [0] [1] [2]
6. Do we have a lightweight review step before AI output reaches customers or production?
Score: [0] [1] [2]
7. Would a new hire find written SOPs for the workflows we'd automate?
Score: [0] [1] [2]
8. Is leadership aligned on "assist humans" vs "replace a role" for the next 90 days?
Score: [0] [1] [2]
9. Do we have budget + a 30-day success metric for a first AI project?
Score: [0] [1] [2]
10. Could we ship a narrow AI-assisted workflow in under 4 weeks with current staff?
Score: [0] [1] [2]

Scoring bands

0-8 Explore - clarify workflows and ownership before buying tools.

9-14 Pilot-ready - pick one workflow, one owner, one 30-day metric.

15-20 Build-ready - scope a narrow build sprint or advisory engagement.

This checklist is a self-assessment, not legal or security advice. Northline Consulting can help turn your score into a 30-day plan.