

FREE CHECKLIST

AI Readiness Checklist

40 checks across data, systems, security, people and use cases. Score your business before you spend a cent on AI.



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How to use this checklist

1. Run it with two or three people who know how the business really runs, not just how it should run.
2. Only tick a check if it's true for most of the business today.
3. Add up the points for every ticked item. Total available: **60 points**.
4. Divide your points by 60 and multiply by 100 for your score.

0-34%

Not ready yet. Fix data and ownership first.

35-59%

Foundations forming. One contained pilot only.

60-84%

Pilot ready. Measure and tighten governance.

85%+

Ready to scale. Watch for sprawl.

Prefer the interactive version? Take it online at conleymarketing.com.au/ai-readiness-checklist and get your score instantly.

1. Data foundations

AI is only as good as the data it reads. This section carries the most weight.

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|--------------------------|---|-------|
| ☐ | One source of truth for customers | 3 pts |
| | Every customer and lead lives in one system (e.g. HubSpot), not split across spreadsheets, inboxes and accounting software. | |
| ☐ | Duplicates under control | 3 pts |
| | Fewer than 5% of contact or company records are duplicates, and you have a process to merge new ones. | |
| ☐ | Fields mean one thing | 2 pts |
| | Key fields (status, industry, source, lifecycle stage) use dropdowns with agreed definitions, not free text. | |
| ☐ | Required fields are actually filled | 2 pts |
| | Core fields like email, company, owner and source are complete on more than 90% of active records. | |
| ☐ | Data has an owner | 2 pts |
| | A named person is responsible for data quality in each core system, with time set aside to do it. | |
| ☐ | You know where your data lives | 2 pts |
| | There's a current list of every system that stores customer, job or financial data. | |
| ☐ | Documents are findable | 2 pts |
| | Policies, procedures, templates and past proposals live in a structured shared drive, not personal folders and email. | |
| ☐ | Historical data is usable | 2 pts |
| | At least 12 months of sales, jobs or support history is in a structured, exportable format. | |

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|--------------------------|--|-------------|
| ☐ | Naming conventions exist
Files, deals, projects and campaigns follow naming rules everyone uses. | 1 pt |
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| ☐ | Regular clean-up routine
Someone runs a monthly data hygiene check: duplicates, bounced emails, stale records, missing owners. | 1 pt |

2. Systems and integration

Can AI reach the data, and can it act on what it finds?

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|--------------------------|---|--------------|
| ☐ | Core tools are cloud-based
Your CRM, project, document and finance tools are cloud platforms with APIs, not desktop software or on-premise servers. | 2 pts |
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| ☐ | Systems talk to each other
Data moves between key tools automatically (e.g. website forms to CRM, CRM to quoting, won deals to project management). | 2 pts |
| <hr/> | | |
| ☐ | No routine double entry
Staff don't re-type the same information into more than one system as part of normal work. | 2 pts |
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| ☐ | Integrations are documented
There's a simple map of what connects to what, and who to call when it breaks. | 1 pt |
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| ☐ | Admin access is controlled
You know who has admin rights to each system, and there are at least two admins for critical tools. | 1 pt |
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| ☐ | You own your accounts
Software accounts are in the business's name, not an ex-staffer's or an agency's. | 1 pt |
| <hr/> | | |
| ☐ | Tool sprawl is under control
You've reviewed subscriptions in the last 12 months and cancelled what overlaps or isn't used. | 1 pt |
| <hr/> | | |
| ☐ | Reporting runs from the systems
Key reports come straight from your tools, not from a spreadsheet someone rebuilds every month. | 1 pt |

3. Security, privacy and governance

The guardrails that stop AI creating a mess you have to explain.

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|--------------------------|---|--------------|
| ☐ | AI usage policy in place
Staff have written guidance on which AI tools they can use and what data they can and can't put into them. | 2 pts |
|--------------------------|---|--------------|

☐	Business-grade AI accounts Staff use business or team plans where data isn't used for model training, not personal free accounts.	2 pts
☐	Sensitive data is identified You know which data is personal, health, financial or commercially sensitive, and where it sits.	2 pts
☐	Privacy obligations understood You understand your obligations under Australian privacy law and your privacy policy covers AI and third-party tools.	1 pt
☐	MFA on everything that matters Multi-factor authentication is on for email, CRM, finance and file storage.	1 pt
☐	Access follows least privilege People (and any AI tools) only have access to the data they need to do the job.	1 pt
☐	Human sign-off rules You've decided which AI outputs need a human to approve them before they go to a customer or into a system.	1 pt
☐	Offboarding is clean When someone leaves, their access to every system is removed the same day.	1 pt

4. People and process

Technology fails when the process is unclear or nobody owns it.

☐	Key processes are written down Your top 5 processes (e.g. lead to quote, quote to job, job to invoice) are documented step by step.	2 pts
☐	There's an owner for AI One person is accountable for AI and automation decisions, even if it's part of their role.	2 pts
☐	Leadership is on board The owner or leadership team has agreed why you're using AI and what success looks like.	1 pt
☐	Staff have had training Team members have had practical training on the AI tools they're expected to use.	1 pt
☐	Time to experiment People have protected time to test and improve workflows, not just squeeze it in after hours.	1 pt
☐	Change is communicated Staff know what's changing, why, and that AI is there to remove grunt work, not their jobs.	1 pt
☐	Feedback loop exists There's a simple way for staff to report what's working, what isn't and new ideas.	1 pt

5. Use cases and measurement

Pick the right first job and prove it paid off.

- ☐ **Repetitive work is listed** 2 pts
You have a list of repetitive tasks with rough hours per week (e.g. data entry, quoting, reporting, email triage).
- ☐ **First use case chosen** 2 pts
You've picked one contained, low-risk process to pilot first, with a clear before and after.
- ☐ **Baseline measured** 1 pt
You know how long the process takes today and what it costs, so you can prove the saving.
- ☐ **Budget set** 1 pt
There's a budget for tools, build and training, including ongoing running costs.
- ☐ **Success criteria agreed** 1 pt
You've agreed what result makes the pilot worth scaling (e.g. 5 hours a week saved with no drop in quality).
- ☐ **Review date in the diary** 1 pt
There's a set date to review the pilot and decide: scale, change or stop.
- ☐ **Vendor claims get tested** 1 pt
You test AI products on your own data before signing up, rather than trusting the demo.

Your score

Section	Points	Available
Data foundations		20
Systems and integration		11
Security, privacy and governance		11
People and process		9
Use cases and measurement		9
Total		60

Our three biggest gaps

Want a second opinion on your score?

The AI Readiness Assessment (\$3,950, 10 business days) reviews your data and systems properly and gives you the top five AI use cases ranked by return, a draft AI policy and a pilot plan.

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