Hybrid Intelligence Readiness Assessment

An executive self-assessment for managing work across people and digital labor.

Before scaling AI, determine whether your organization is ready to manage the work system it creates.

ORGANIZATION		WORKFLOW OR BUSINESS UNIT	
COMPLETED BY		DATE	

WHAT READINESS MEANS

Hybrid intelligence readiness is the organization's ability to design, govern, evidence, and sustain work in which people and digital systems contribute to a trusted outcome while human accountability remains clear.

A material hybrid intelligence work system is a workflow in which AI can affect consequential work, decisions, people, obligations, or operational continuity.

USE THIS ASSESSMENT CORRECTLY

- Assess one material workflow first. Do not average unrelated use cases into one enterprise score.
- Score only what can be supported by a named owner, document, metric, test, or recurring practice.
- Treat the lowest readiness gate as the current limit on how far the workflow should proceed.

THE FOUR READINESS GATES

1 Work and Architecture Fit
Trusted outcome, actual work, subtraction, simplification, and human to digital handoffs.

2 Hybrid Intelligence Work System Readiness
Human accountability, authority boundaries, supervision, intervention, and recovery.

3 Evidence and Claims Readiness
Outcome measurement, traceability, and claims that remain proportional to evidence.

4 Continuity and Human Capability Readiness
Capability preservation, operational continuity, employee participation, and recourse.

EVIDENCE-BASED SCORING

0	**Not addressed**	The practice is absent, unknown, or unsupported by evidence.
1	**Planned or scoped**	The practice has been discussed or designed, but it is not operating consistently.
2	**Demonstrated**	The practice exists in at least one real and bounded use case.
3	**Validated**	The practice has operated repeatedly and is supported by documented internal evidence. This is not external certification.

WHY THIS MATTERS TO EVERY EXECUTIVE FUNCTION

AI readiness is a shared management responsibility across leadership, operations, technology, finance, HR, legal, security, and risk. Operational owners remain accountable for outcomes. Assess one material workflow together, using evidence from the people who perform, supervise, and depend on the work.

POTENTIAL BUSINESS VALUE

Better-defined decision rights and handoffs can support more reliable delivery, less avoidable rework, stronger workforce adaptability, and clearer evidence for AI investment decisions. These are outcomes to measure, not promised returns.

ASSESSMENT

Twelve Questions Across Four Readiness Gates

Enter a score from 0 to 3 for each statement. Identify the strongest evidence or the most important concern for each gate.

1 WORK & ARCHITECTURE FIT

Clarify the trusted outcome before selecting or expanding AI.

1. Outcome clarity: We can state the trusted outcome, who depends on it, and what could happen if the work fails.	
2. Work redesign: We examined the actual workflow and identified what should be removed, simplified, retained by people, augmented by AI, or assigned to digital labor.	
3. Work system architecture: We defined where work, information, decisions, approvals, and exceptions move between people and digital systems, with controls at each handoff.	

Gate subtotal: ____ / 9

Evidence or concern: _____

2 HI WORK SYSTEM READINESS

Define who remains responsible and what digital labor may do.

4. Human accountability: A named human owner remains accountable for every material outcome produced through the workflow.	
5. Authority boundaries: We defined what digital labor may do independently, what requires approval, and what must remain under human control.	
6. Supervision and intervention: Responsible employees can inspect, challenge, correct, pause, escalate, and recover the system when needed.	

Gate subtotal: ____ / 9

Evidence or concern: _____

3 EVIDENCE & CLAIMS READINESS

Prove performance and keep organizational claims proportional.

7. Outcome measurement: We measure the intended operational, customer, employee, or public outcome, not only adoption, activity, speed, or model performance.	
8. Traceability: We can reconstruct material outputs, decisions, changes, human interventions, and exceptions when review is required.	
9. Claims discipline: Claims about value, safety, readiness, productivity, and workforce impact remain proportional to available evidence.	

Gate subtotal: ____ / 9

Evidence or concern: _____

4 CONTINUITY & HUMAN CAPABILITY READINESS

Preserve what people and the operation must still be able to do.

10. Human capability preservation: We identified the knowledge, judgment, relationships, and skills that must remain available even when AI performs more work.	
11. Operational continuity: Essential work can continue if AI fails, degrades, changes, becomes unavailable, or must be withdrawn.	
12. Employee participation and recourse: Affected employees understand the change, can contribute, and have a clear route to raise concerns or challenge consequential outcomes.	

Gate subtotal: ____ / 9

Evidence or concern: _____

Decision rule: A strong total cannot compensate for an absent accountable owner, undefined authority, missing recourse, or a workflow that cannot continue safely when AI is unavailable.

INTERPRETATION

Read the Result in the Right Order

The total score provides context. Stop conditions and the weakest readiness gate determine how far the selected workflow should proceed.

Gate 1	Gate 2	Gate 3	Gate 4	Total
LOWEST READINESS GATE				

1. INTERPRET THE LOWEST GATE

0 to 2	**Critical exposure**	Essential foundations are absent or unknown. Pause material deployment until ownership and controls are established.
3 to 4	**Early formation**	Some practices exist, but they remain informal, inconsistent, or dependent on individual judgment.
5 to 6	**Controlled development**	Bounded and reversible pilots may be appropriate while remaining gaps are actively managed.
7 to 8	**Managed readiness**	Core practices are documented and operating, though evidence or consistency may still need improvement.
9	**Validated within this gate**	The practice operates repeatedly with documented internal evidence. This does not constitute external certification.

2. USE THE TOTAL SCORE AS CONTEXT

0 to 9	**Explore without material deployment**	Clarify the work, outcome, ownership, and risk before introducing consequential digital labor.
10 to 18	**Use bounded experimentation**	Keep pilots small, reversible, supervised, and separated from consequential production decisions.
19 to 27	**Proceed through controlled deployment**	Expand only where the weakest gate and all stop conditions are being actively managed.
28 to 36	**Consider evidence based scaling**	Broader use after appropriate workflow specific legal, security, privacy, safety, accessibility, and workforce review.

3. APPLY THE STOP CONDITIONS

Do not scale a material hybrid intelligence work system when any of the following remain true:

- ☐ No named human is accountable for the outcome.
- ☐ Digital labor authority has not been defined.
- ☐ Responsible employees cannot inspect, challenge, correct, pause, or escalate the system.
- ☐ Consequential outputs or decisions cannot be reconstructed and reviewed.
- ☐ There is no continuity plan for failure, degradation, withdrawal, or loss of access.
- ☐ Critical human knowledge or judgment may disappear without a deliberate preservation plan.
- ☐ Affected people have no meaningful route to question harmful or consequential outcomes.

IMPORTANT: HOW TO USE THE SCORES

These score bands are doctrine-derived, directional decision aids, not empirically validated benchmarks or evidence that a workflow is safe. Apply the stop conditions first. Confirm findings with relevant operational, workforce, security, privacy, legal, and risk owners before authorizing expansion.

ACTION

Your 30 Day Readiness Response

Convert the assessment into one bounded management decision. Improving the work system is the objective. Purchasing more technology is not the default response.

READINESS DECISION

Based on this assessment, we will ☐ pause ☐ explore ☐ pilot ☐ continue ☐ scale the selected workflow only within the authority and evidence boundaries documented below.

SELECTED MATERIAL WORKFLOW	
LOWEST READINESS GATE	
NAMED ACCOUNTABLE OWNER	
NEXT FORMAL REVIEW DATE	

THREE ACTIONS TO COMPLETE WITHIN 30 DAYS

#	Action	Owner	Evidence of completion	Target date
1				
2				
3				

Evidence test: **What document, metric, decision record, test, owner, or recurring practice will prove that each action is complete?**

OPTIONAL AI REFLECTION PROMPT

Using an organization approved AI assistant, review this completed assessment as a critical readiness reviewer. Identify the lowest gate, any stop condition, the three most consequential actions for the next 30 days, and the evidence required to improve each score. Separate established facts from assumptions and unanswered questions. Identify one plausible way we may be overestimating readiness. Do not recommend purchasing new technology unless technology is clearly the limiting factor. Keep human accountability explicit.

CONTINUE THE WORK

TRAIT Framework Build organizational readiness, governance, work redesign, and capability.	**Employee Field Guide** Prepare employees to collaborate with digital labor, exercise judgment, and participate.	**Managing Hybrid Intelligence** Use the broader management doctrine to design and operate human and digital work systems.

A readiness assessment is most valuable when it leads directly to action.

Organizations do not need to purchase new technology or hire a consultant to begin strengthening their Hybrid Intelligence readiness.

Two free Managing Hybrid Intelligence resources are designed to work together as a practical starting point for organizations and employees beginning this transition:

1. The Responsible AI Transition (TRAIT) Framework

TRAIT helps organizations examine whether they are ready to introduce, expand, or govern AI-enabled work responsibly. TRAIT is intended to help organizations move beyond technology adoption and focus on the operating conditions required for responsible implementation.

2. The Working with Digital Labor Employee Field Guide

The Employee Field Guide addresses the same transition from the employee perspective. It helps people understand how work may change when AI begins performing part of a role, how to collaborate effectively with digital labor, where human judgment remains essential, and how employees can participate constructively in the redesign of work.

Used together, the two resources connect organizational readiness with employee readiness. TRAIT helps leaders design the transition. The Employee Field Guide helps people work within that transition.

Neither is intended to replace organizational judgment, legal review, security controls, risk management, or appropriate human oversight. Together, however, they provide a practical foundation for beginning the work before a large technology investment is made.

Use Them with an Organization-Approved AI Assistant

Organizations are encouraged to use both resources alongside an approved AI assistant to accelerate learning and structured decision-making.

For example, a team can provide the AI assistant with its completed Hybrid Intelligence Readiness Assessment, the TRAIT Framework, and the Employee Field Guide and ask it to:

- identify weaknesses in the current transition plan;
- challenge assumptions about which work should be automated;
- map potential human and digital responsibilities;
- surface governance, capability, and continuity gaps;
- generate questions leaders should resolve before deployment;
- help employees translate the doctrine into their own work context; and
- distinguish between what the organization knows, what it assumes, and what still requires evidence.

The AI assistant should be treated as a thinking partner, **not as the final authority**.

Each resource comes with a master prompt, but advanced users are encouraged to tailor it to their preferences from the beginning.

Human leaders remain accountable for decisions, controls, validation, workforce impacts, and the consequences of implementation.

A Practical Starting Sequence

Organizations can begin immediately:

1. Complete the Hybrid Intelligence Readiness Assessment for one material workflow.
2. Use TRAIT to examine the lowest-scoring readiness gate and redesign the transition where necessary.
3. Use the Employee Field Guide with the people whose work is affected.
4. Use an organization-approved AI assistant to challenge the proposed work design, identify missing evidence, and generate alternative approaches.
5. Reassess the workflow after changes have been made.

This creates a simple cycle:

Assess → Redesign → Prepare People → Challenge With AI → Reassess

The purpose is not to reach a perfect score but rather to build the organizational capability to manage work shared between people and digital labor with greater clarity, accountability, and evidence.

WHEN AN INDEPENDENT READINESS REVIEW MAY HELP

A self-assessment may surface decisions that require deeper evidence and cross-functional discussion. The two-week Hybrid Intelligence Work System Readiness Review examines one material AI-enabled workflow and produces an executive readiness brief, a human and digital work system map, prioritized management control recommendations, and a 30/60/90-day action roadmap.

Organizations can begin independently with these free resources. If independent review would be helpful, contact myWorkforceAgents.ai to discuss whether a bounded advisory engagement is appropriate. The assessment and review complement, rather than replace, existing HR, operations, technology, legal, security, and risk expertise.

Free frameworks and resources: Open the Frameworks and Resources page

Developed by Dr. Timothy J. Giardino, Founder of myWorkforceAgents.ai and author of Managing Hybrid Intelligence.

This self assessment is a directional management tool, not an audit, certification, legal opinion, or assurance of safety. It does not replace workflow specific legal, security, privacy, safety, labor, accessibility, or regulatory review.