

AI Readiness Checklist

A practical, proportionate starting point for smaller organisations exploring AI

This checklist provides a practical, proportionate way for smaller organisations to understand their readiness for AI adoption. It is designed for Ombudsman schemes, regulators, complaints bodies, and member-based organisations seeking safe, low-risk ways to improve efficiency, quality, and organisational intelligence. Use this checklist to identify strengths, gaps, and priority areas before committing to any AI initiative.

Tick each item to identify strengths, gaps and priority areas.



1. Strategic Readiness

- ☐ We have a clear understanding of the problems or pain points we want AI to help with
- ☐ We have defined what AI *will not* be used for (e.g., decision automation)
- ☐ AI adoption is aligned with our organisational strategy and mandate
- ☐ Leaders understand the potential value and risks of AI
- ☐ We have a shared internal vision for how AI could support staff and service delivery



2. Process & Workflow Readiness

- ☐ Key workflows are documented or can be quickly mapped
- ☐ We understand where administrative load is highest
- ☐ We know which tasks are repetitive, manual or low-value
- ☐ Staff can identify areas where AI could improve efficiency or quality
- ☐ We have clarity on which processes require human judgment and independence



3. Data Readiness

- ☐ We know what data we collect and where it is stored
- ☐ Our data is reasonably accurate, complete and accessible
- ☐ Sensitive data is governed appropriately
- ☐ We understand which use cases require structured vs unstructured data
- ☐ We have basic data hygiene practices (duplicate removal, consistent fields, etc.)

 4. Technology & Systems Readiness

- ☐ We understand our current system landscape and integrations
- ☐ We have access to modern tools that can support AI adoption
- ☐ We can trial new tools without major disruption
- ☐ We have basic IT support for pilots or small implementations
- ☐ We can export or access data needed for AI use cases

 5. Governance & Risk Readiness

- ☐ We have clear privacy, security and data handling policies
- ☐ We understand the ethical risks associated with AI
- ☐ We can explain AI outputs in plain English
- ☐ We have a human-in-the-loop approach for any AI-supported workflow
- ☐ We have a way to monitor accuracy, fairness and unintended impacts

 6. People & Change Readiness

- ☐ Staff are open to exploring new tools
- ☐ We can provide basic training or onboarding for AI tools
- ☐ We have clarity on roles and responsibilities when AI is introduced
- ☐ We can run small pilots without major disruption
- ☐ We have a plan for communicating changes to staff

 7. Implementation Readiness

- ☐ We can run a small, low-risk pilot
- ☐ We can measure success using simple metrics (time saved, quality uplift, etc.)
- ☐ We have a clear owner for AI initiatives
- ☐ We can scale successful pilots gradually
- ☐ We can stop or adjust an initiative if risks emerge

8. Priority Use Case Identification

- ☐ We have identified at least 3–5 potential AI use cases
- ☐ We have assessed each use case for value, risk, and feasibility
- ☐ We have a sense of which use cases are “no-regrets”
- ☐ We understand which use cases require stronger governance
- ☐ We have a draft roadmap or sequence of initiatives

Checklist Summary

Count your ticks:

- **30+ ticks:** Strong readiness — you can safely begin pilots
- **20–29 ticks:** Moderate readiness — start with low-risk, high-value use cases
- **10–19 ticks:** Early readiness — begin with a structured assessment
- **<10 ticks:** Foundational work needed before adopting AI

If you'd like support interpreting your results, OSC offers a 2-week AI Readiness Snapshot — a practical, low-risk engagement that provides a tailored assessment, use case catalogue, prioritisation matrix and roadmap.