

10-Minute AI Readiness Checklist (1–20 Employees)

Lean Team / Emerging Stage Focus: Low Friction Quick-Wins & Clean Data Foundations

Scoring Instructions (18 Comprehensive Checks):

Check items fully operational today. 15-18 = Scaling/Transformer • 10-14 = Operationalizer • 5-9 = Experimenter • 0-4 = Explorer

PILLAR 1: STRATEGY & MANDATE

- ☐ STR-01 Single Executive Owner: Appoint a named leader with 3+ allocated weekly hours to evaluate and approve AI tooling.
- ☐ STR-02 Targeted Success Metrics: Pre-agree on 2–3 specific operational metrics (e.g. turnaround time reduction, customer response velocity).
- ☐ STR-03 No Shadow Spending: Centralize all software subscription card charges under a single review process.

PILLAR 2: USE CASES & PORTFOLIO

- ☐ USE-01 High-Friction Bottleneck Audit: Document the top 2 manual repetitive workflows consuming >5 hours/week per person.
- ☐ USE-02 Low-Risk Pilot Selection: Select non-client-critical internal workflows (intake summaries, draft formatting) for initial testing.
- ☐ USE-03 Pre/Post Baseline Measurement: Record baseline hours before tool rollout to verify real throughput gains.

PILLAR 3: READY-STATE DATA

- ☐ DAT-01 Consolidated Shared Drives: Migrate files out of individual desktop folders and inboxes into organized cloud drives.
- ☐ DAT-02 Clean Folder Taxonomy: Enforce standard naming conventions and folder structures for client deliverables.
- ☐ DAT-03 Data Source Verification: Maintain a verified list of approved authoritative internal documents.

PILLAR 4: TECHNOLOGY & ARCHITECTURE

- ☐

TEC-01

 Deterministic-First Rule: Test low-cost deterministic templates (forms, scripts) before buying expensive AI seat subscriptions.
- ☐

TEC-02

 Vendor Security Review: Ensure every adopted tool offers explicit commercial privacy terms (no model training on company data).
- ☐

TEC-03

 Integration Simplicity: Prioritize tools that connect natively with existing core software (email, spreadsheets).

PILLAR 5: PEOPLE & ENABLEMENT

- ☐

PEO-01

 Prompt Playbook: Create and distribute a 1-page prompt guide with role-specific context templates.
- ☐

PEO-02

 Hands-on Team Walkthrough: Conduct a 30-minute interactive working session to align team adoption standards.
- ☐

PEO-03

 Designated Champion: Identify 1 enthusiastic team member as the primary peer contact for tool questions.

PILLAR 6: GOVERNANCE & PRIVACY

- ☐

GOV-01

 Written Acceptable Use Policy: Publish an explicit policy prohibiting the pasting of client PII or proprietary IP into public LLMs.
- ☐

GOV-02

 Model Training Toggles: Formally verify that data sharing/training toggles are turned OFF on all active user accounts.
- ☐

GOV-03

 Monthly License Hygiene: Audit active tool seats monthly to cancel unused accounts immediately.

Next Step: Review Your Unchecked Pillars with a Fulcrum Tactics Strategist

Unchecked items highlight immediate risk points where software spend or pilot complexity is outpacing foundations.

Book a confidential 30-minute operational review to scope deterministic fixes and ROI: fulcrumtactics.com/contact.html

Or reach our consulting practice directly at cont@fulcrumtactics.com.