

10-Minute AI Readiness Checklist (101–500 Employees)

Enterprise Scale Focus: Multi-Agent Orchestration, Compliance & Unit-Economic Governance

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: STRATEGIC MANDATE

☐ STR-01 Board-Level Mandate: Align AI roadmaps with annual operating plans and disclosed executive KPI commitments.

☐ STR-02 Capital Allocation Model: Establish a dedicated innovation budget with audited IRR and payback period benchmarks.

☐ STR-03 Enterprise Architecture Review: Mandate formal architectural review board (ARB) approval for all AI deployments.

PILLAR 2: WORKFLOW ENGINEERING

☐ USE-01 Multi-Agent Orchestration: Deploy deterministic state machines for complex multi-step departmental handoffs.

☐ USE-02 Automated Exception Handling: Build deterministic fallback routing when AI confidence falls below threshold.

☐ USE-03 End-to-End Audit Logs: Maintain immutable execution logs for every automated decision and generated deliverable.

PILLAR 3: CENTRALIZED DATA FABRIC

☐ DAT-01 Governed Cloud Data Warehouse: Unify enterprise data layers with automated ETL/ELT pipelines and lineage tracking.

☐ DAT-02 Role-Based Access Control (RBAC): Enforce granular row-level and column-level security across all data models.

☐ DAT-03 Synthetic Data Testing: Maintain clean staging databases for testing agentic pipelines without exposing live production data.

PILLAR 4: CUSTOM IP & UNIT ECONOMICS

- ☐ TEC-01 Proprietary Microservices: Replace high-seat SaaS licenses with custom deterministic modules saving recurring spend.
- ☐ TEC-02 Multi-Model Tiering: Route queries intelligently (local SLMs for extraction, frontier models only for complex synthesis).
- ☐ TEC-03 Token & Latency Telemetry: Implement real-time monitoring for API token costs, latency spikes, and rate limits.

PILLAR 5: ENTERPRISE ENABLEMENT

- ☐ PEO-01 Institutionalized Training Tracks: Provide tier-based curriculum (Foundational, Operationalizer, Builder) for all staff.
- ☐ PEO-02 ADKAR Change Management: Track awareness, desire, knowledge, ability, and reinforcement metrics across business units.
- ☐ PEO-03 Internal Prompt & Workflow Hub: Maintain an enterprise-wide version-controlled library of approved prompts.

PILLAR 6: SECURITY & REGULATORY COMPLIANCE

- ☐ GOV-01 Prompt Injection Defense: Deploy automated input sanitization and boundary filtering on all public-facing endpoints.
- ☐ GOV-02 Data Residency Governance: Enforce geographic data residency and compliance certifications (SOC2, HIPAA, GDPR).
- ☐ GOV-03 Red-Teaming & Stress Testing: Conduct bi-annual adversarial penetration testing of autonomous workflow agents.

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.