

10-Minute AI Readiness Checklist (21–100 Employees)

Mid-Sized Growth Focus: Cross-Department Prioritization & Operational Value Gates

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 Cross-Functional Steering: Establish a monthly AI working group with leaders from Ops, Sales, Finance, and Delivery.

☐ STR-02 EBITDA & ROI Alignment: Require business cases with projected payback periods (<9 months) for all new pilot budgets.

☐ STR-03 Formal Stage-Gates: Define criteria to graduate informal experiments into production workflows or retire them.

PILLAR 2: USE CASE PORTFOLIO

☐ USE-01 Shadow-AI Inventory: Audit and catalog all unauthorized AI tools, browser extensions, and accounts across departments.

☐ USE-02 Impact vs. Effort Scoring: Rank candidate workflows on an objective 2x2 matrix to prioritize the top 3 highest-value pipelines.

☐ USE-03 Telemetry Tracking: Track weekly usage rates and error rates across all active departmental workflows.

PILLAR 3: READY-STATE DATA

☐ DAT-01 Schema Validation Rules: Enforce structured inputs and schema checks before passing operational data to AI models.

☐ DAT-02 Silo Consolidation: Connect CRM, ERP, and project management databases via standard API connections.

☐ DAT-03 Sensitive Data Masking: Implement automated redaction of confidential customer records and financial identifiers.

PILLAR 4: DETERMINISTIC ARCHITECTURE

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TEC-01

 Hybrid Architecture Standard: Maintain 80% deterministic rules + 20% targeted LLM inference for optimal unit economics.
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TEC-02

 Build vs Buy Scoping: Conduct 3-year TCO evaluations before committing to six-figure third-party enterprise platforms.
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TEC-03

 API Pipeline Guardrails: Deploy structured JSON output schemas and deterministic fallback handling on all automated endpoints.

PILLAR 5: DEPARTMENT CHAMPIONS

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PEO-01

 Champion Network: Appoint and empower departmental champions with 4 hours/week dedicated to workflow optimization.
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PEO-02

 SOP Integration: Embed verified prompt workflows directly into standard operating procedures and onboarding.
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PEO-03

 Adoption Knowledge Sharing: Host bi-weekly brown-bag sessions to share proven departmental prompt templates.

PILLAR 6: SPEND & COMPLIANCE CONTROL

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GOV-01

 Centralized License Governance: Manage all software seats under corporate SSO with automated offboarding.
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GOV-02

 SOC2 & Privacy Adherence: Require signed Data Processing Agreements (DPAs) with zero-data-retention clauses from vendors.
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GOV-03

 Quarterly Value Realization Audits: Review total software spend against actual reclaimed employee hours every quarter.

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.