

10-Minute AI Readiness Checklist (500+ Employees)

Large Institutional Focus: Enterprise Ecosystem Transformation & Board-Level 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: INSTITUTIONAL GOVERNANCE

- ☐
- STR-01
- AI Transformation Office (AITO): Dedicated executive team overseeing portfolio allocation and regulatory disclosures.
- ☐
- STR-02
- Board-Level Risk Disclosures: Maintain audited quarterly reporting on AI spend, unit-economic ROI, and operational risk.
- ☐
- STR-03
- Enterprise Vendor Consolidation: Master service agreements with strict IP ownership, indemnity, and SLA commitments.

PILLAR 2: AUTONOMOUS WORKFLOW ORCHESTRATION

- ☐
- USE-01
- Enterprise Agent Fabric: Distributed multi-agent swarms operating in isolated compute sandboxes with strict RBAC.
- ☐
- USE-02
- Deterministic State Verification: Every autonomous agent output is mathematically validated before database commit.
- ☐
- USE-03
- Continuous Payback Tracking: Real-time telemetry dashboards tracking EBITDA labor efficiency across thousands of seats.

PILLAR 3: ENTERPRISE DATA ARCHITECTURE

- ☐
- DAT-01
- Automated Metadata Cataloging: Enterprise-wide semantic data fabric with automated classification and compliance tags.
- ☐
- DAT-02
- Zero-Trust Data Boundaries: Cryptographic isolation of sensitive corporate units and client records.
- ☐
- DAT-03
- Continuous Lineage Telemetry: Full provenance tracing for every data point ingested or transformed by AI pipelines.

PILLAR 4: CUSTOM IP & MULTI-CLOUD TOPOLOGY

- ☐ TEC-01 Private Model Infrastructure: Fine-tuned domain models and deterministic microservices hosted in dedicated VPCs.
- ☐ TEC-02 Multi-Cloud High Availability: Redundant routing across model providers to prevent vendor lock-in and outages.
- ☐ TEC-03 Cost Optimization Engine: Algorithmic token compression, semantic caching, and dynamic model routing.

PILLAR 5: INSTITUTIONAL CHANGE & CULTURE

- ☐ PEO-01 Executive & Board Education: Ongoing briefings for senior leaders on frontier model developments and regulatory changes.
- ☐ PEO-02 Global Change Network: Embedded enablement teams across all global regions and operating subsidiaries.
- ☐ PEO-03 Incentive & KPI Realignment: Compensation incentives tied directly to verified operational automation and efficiency.

PILLAR 6: ENTERPRISE RISK & LEGAL DEFENSE

- ☐ GOV-01 Continuous Automated Compliance: Real-time regulatory audit trails conforming to EU AI Act, NIST, and SEC guidance.
- ☐ GOV-02 Algorithmic Drift Monitoring: Automated statistical monitoring for model drift, accuracy decay, and bias.
- ☐ GOV-03 Third-Party Forensic Auditing: Independent annual security and cryptographic key isolation audits.

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.