

AI Opportunity & Readiness Scorecard

Use this worksheet before approving a pilot or buying a tool. Score one real workflow, then choose the next decision that fits the evidence.

TEAM _____

WORKFLOW _____

OWNER / DATE _____

Circle one score for each line. Use what can be shown today, not what the team intends to add later.

0 Not yet 1 Partial 2 In place

01

Opportunity
The work is worth changing.

SCORE ____ / 8

1A

One workflow is named.
The team can point to the current process, not a broad AI ambition.

0 1 2

1B

The problem is observable.
Delay, rework, cost, risk, or missed capacity can be shown.

0 1 2

1C

A decision owner exists.
One person can approve the use case and resolve exceptions.

0 1 2

1D

The result is measurable.
The team has a useful before-and-after measure and review date.

0 1 2

02

Workflow
The operating change is understood.

SCORE ____ / 8

2A

The current steps are mapped.
Inputs, handoffs, exceptions, and output users are visible.

0 1 2

2B

Data and access are available.
The team knows what the tool needs and who can grant permission.

0 1 2

2C

Human review is placed.
A named person checks material output before it changes the work.

0 1 2

2D

The fallback is clear.
The team can continue safely when the AI tool is wrong or unavailable.

0 1 2

03

Governance
The decision can be inspected later.

SCORE ____ / 8

3A

Data boundaries are written.
Allowed and prohibited inputs are clear to the people using the tool.

0 1 2

3B

Approval and permissions are recorded.
Purpose, owner, system access, and limits have a short record.

0 1 2

3C

Material output leaves evidence.
The team can show the input, review, change, and final decision.

0 1 2

3D

Stop and incident paths exist.
Someone can halt use, report a problem, and preserve the record.

0 1 2

04

Delivery
The team can carry the change.

SCORE ____ / 8

4A

A sponsor can fund the next step.
Budget authority and procurement route are known.

0 1 2

4B

A workflow owner has time.
The person responsible can test, answer questions, and accept the work.

0 1 2

4C

Users can learn the new process.
Training, support, and exception handling have an owner.

0 1 2

4D

A decision date is set.
The pilot ends with a stop, revise, or continue decision.

0 1 2

TOTAL SCORE

____ / 32

Add all four zone scores.

0-10

Clarify before build
Name the workflow, owner, problem, and useful result.

11-20

Run a focused workshop
Resolve the highest-impact gaps and write the decision pack.

21-26

Plan a controlled pilot
Set the boundary, review point, evidence, and stop condition.

27-32

Prepare implementation
Confirm scope, access, delivery owner, and written success measure.