TEMPLATE 05 · AI-LED TRANSFORMATION

AI Readiness Assessment

Find out how ready the organisation really is to use AI well, across six dimensions, before you choose where to start.

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Most AI plans start with the technology. The ones that last start with an honest look at data, skills, rules and how work actually gets done.

> *The gap is rarely the model. It's the data, the process and the people around it.*

HOW TO USE IT

01 **Choose the scope:** the whole organisation, or one division or function.

02 **Score each statement** from 1 to 5 on your own first (page 2). Note the evidence.

03 **Compare scores** as a leadership team. Talk about the biggest differences.

04 **Agree the top three gaps** and the actions that close them (page 3).

SIX DIMENSIONS

1 Strategy & leadership
Leaders agree where AI should create value, in business terms.

2 Data
The data our priority use cases need exists and can be accessed.

3 Technology & platforms
We have a secure environment to build, test and run AI.

4 People & skills
We have, or can buy, the skills to build and run AI.

5 Governance & risk
There is an agreed policy for acceptable AI use.

6 Adoption & ways of working
We have taken at least one AI use case into live use.

FIVE LEVELS OF MATURITY

1	2	3	4	5
Exploring	**Experimenting**	**Scaling**	**Embedded**	**Leading**
Interest, a few experiments, no plan.	Pilots in pockets, little reuse.	Several live uses, shared platform and rules.	AI is part of how core processes run.	AI shapes the strategy and the business model.

Score with evidence. If you can't point to a live example, policy or measure, the score is 2 or below.

The Excel version averages each dimension, draws a radar chart and compares up to eight leaders' scores, so you can see where views differ.

WORKED EXAMPLE: A MID-SIZED UK LENDER

Strongest: strategy, 3.0
The board has named AI as a lever for cost-to-income, with a sponsor.

Weakest: data, 1.7
Mortgage and savings data sit in separate systems with no single customer view.

Biggest disagreement
IT scored governance 4. Risk scored it 2.

Overall: level 2
Experimenting. Start with use cases that need little new data.

STATEMENT	SCORE	EVIDENCE
STRATEGY & LEADERSHIP		
Leaders agree where AI should create value, in business terms.	1–5	
There is a named executive sponsor and a funded plan.	1–5	
AI ambitions are linked to the wider strategy, not run as side projects.	1–5	
DATA		
The data our priority use cases need exists and can be accessed.	1–5	
Data quality is measured and owned.	1–5	
We know which data we may lawfully use, and for what.	1–5	
TECHNOLOGY & PLATFORMS		
We have a secure environment to build, test and run AI.	1–5	
AI can be connected to our core systems and workflows.	1–5	
We can monitor models once they are live.	1–5	
PEOPLE & SKILLS		
We have, or can buy, the skills to build and run AI.	1–5	
Staff understand what AI can and can't do.	1–5	
Managers are ready to redesign roles around AI.	1–5	
GOVERNANCE & RISK		
There is an agreed policy for acceptable AI use.	1–5	
Each AI system has an owner and a risk rating.	1–5	
Risk, compliance and data protection are involved early.	1–5	
ADOPTION & WAYS OF WORKING		
We have taken at least one AI use case into live use.	1–5	
Teams change processes, not just add tools.	1–5	
We measure benefits after go-live.	1–5	

Scoring guide

1 **Exploring.** Interest, a few experiments, no plan.

2 **Experimenting.** Pilots in pockets, little reuse.

3 **Scaling.** Several live uses, shared platform and rules.

4 **Embedded.** AI is part of how core processes run.

5 **Leading.** AI shapes the strategy and the business model.

Dimension averages

Strategy & leadership _____

Data _____

Technology & platforms _____

People & skills _____

Governance & risk _____

Adoption & ways of working _____

Overall level

Average of the six. Round down.

Gaps and actions

ORGANISATION OR AREA

DATE

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Strongest dimension

What we can build on.

Weakest dimension

What will hold back every use case.

Where we disagree

Dimensions where scores differ by two or more.

Top three gaps and actions

Each action needs an owner and a date

#	GAP	WHY IT MATTERS FOR OUR USE CASES	ACTION	OWNER	BY
1					
2					
3					

Implication for where we start

Use cases that fit today's readiness, and those that must wait.

Review date

Re-run the assessment in six to twelve months.