

AI READINESS

— CHECKLIST FOR CIOs —

NEW
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CONSULTING

Mid-Market Edition

Purpose:

This checklist helps CIOs and leadership teams assess organizational readiness for AI across four critical dimensions: data, culture, technology, and governance. Use it to identify strengths, surface gaps, and prioritize readiness investments.

Instructions:

- Rate each statement from 1 to 4 (1 = not true / significant gaps, 4 = fully true / strong capability)
- Tally scores by section and overall
- Use results to inform AI strategy conversations and roadmap decisions

Section 1: Data Readiness

#	Statement	Rating (1 - 4)
1	Our key datasets (customers, products, finance, operations) are generally accurate and consistent.	
2	We have a central platform (data warehouse, lake, or equivalent) where we can combine data from multiple systems.	
3	Business and IT agree on which data sources are “trusted” for reporting and analytics.	
4	Data ownership is clearly defined for major domains (customer, finance, operations, etc.).	
5	We have documented policies for who can access which data, and those policies are enforced.	
Section 1 Total:		____ / 20

Key Observations - Data Readiness

What’s working well:

Priority gaps to address:

Section 2: Cultural Readiness

#	Statement	Rating (1 - 4)
6	Our executive team has a shared view of why we are investing in AI and what we expect it to achieve.	
7	AI initiatives are tied to specific business outcomes (e.g., margin improvement, speed, risk reduction), not just "innovation."	
8	Most managers are comfortable using data and analytics tools in their decision-making.	
9	We are actively addressing employee concerns about AI through training, communication, or change management.	
10	We have successfully managed major technology changes in the past 3 - 5 years (ERP, cloud, digital transformation, etc.).	
Section 2 Total:		____ / 20

Key Observations - Cultural Readiness

What's working well:

Priority gaps to address:

Section 3: Technical Readiness

#	Statement	Rating (1 - 4)
11	Our critical systems (ERP, CRM, line-of-business applications) are supported, reasonably current, and not heavily out of date.	
12	We have standard ways to integrate systems and move data (APIs, ETL/ELT processes, integration platforms).	
13	We use cloud platforms that can host or connect to AI services (Azure, AWS, Oracle Cloud, or similar).	
14	Identity and access management (SSO, role-based access controls) is in place for most key systems.	
15	We have basic monitoring, logging, and alerting for critical applications and infrastructure.	
Section 3 Total:		____ / 20

Key Observations - Technical Readiness

What's working well:

Priority gaps to address:

Section 4: Governance & Risk Readiness

#	Statement	Rating (1 - 4)
16	We have a documented policy (even if brief) for acceptable and unacceptable uses of AI tools and services.	
17	We have defined who must approve new AI use cases or initiatives before they begin.	
18	We evaluate AI initiatives for privacy, security, compliance, and ethical risks before building or deploying them.	
19	We have a plan for monitoring AI systems in production (performance, accuracy, usage patterns).	
20	Our risk, compliance, or legal function is engaged in AI conversations and has input into decisions.	
Section 4 Total:		____ / 20

Key Observations - Governance & Risk Readiness

What's working well:

Priority gaps to address:

Overall Readiness Score

Dimension	Score (out of 20)
Data Readiness	
Cultural Readiness	
Technical Readiness	
Governance & Risk Readiness	
TOTAL	____ / 80

Interpreting Your Score

65 – 80: Strong Readiness

You can safely pursue a portfolio of AI initiatives.

- Your organization has solid foundations across data, culture, technology, and governance.
- Focus your AI strategy on selecting the right use cases and delivering early wins.
- Consider bringing in external consulting to accelerate execution and build internal capability.

Recommended next steps:

1. Identify 2 – 3 high-value AI use cases aligned with business outcomes
 2. Establish a 6 – 12 month roadmap with phased implementation
 3. Formalize lightweight governance (approval process, monitoring plan)
 4. Pilot first initiative within 1 – 3 months
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45 – 64: Emerging / Established Readiness

You are ready for targeted AI projects while addressing specific gaps.

- Your organization has a reasonable foundation but uneven readiness across dimensions.
- Start with low-risk, high-value use cases (AI-powered search, document processing, simple automation).
- Address 1 – 2 critical gaps in parallel (data governance, cloud adoption, policy framework).

Recommended next steps:

1. Review section scores to identify your biggest readiness gap
 2. Launch a 3 – 6 month foundational improvement initiative (data governance, policy design, team training)
 3. Run a small pilot on a low-risk, high-value use case in parallel
 4. Plan a second-phase roadmap once key gaps are closed
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20 – 44: Early-Stage Readiness

Focus first on foundational improvements before larger AI deployments.

- Your organization has significant readiness gaps that will constrain AI initiatives.
- Rushing into AI projects risks failure, wasted budget, and lost credibility.
- Invest in foundational work: data strategy, infrastructure modernization, team capability building, and governance design.

Recommended next steps:

1. Prioritize the 1 – 2 dimensions with the lowest scores
2. Develop a 6 – 12 month readiness improvement plan (data modernization, cloud adoption, governance framework)
3. Consider external consulting to accelerate foundational work and avoid common pitfalls
4. Plan AI pilots for Year 2 once foundations are stronger

Summary: Priority Actions

Based on your assessment, capture the top 3 actions your organization should take in the next 3 – 6 months:

Priority Action 1:

Priority Action 2:

Priority Action 3:

Disclaimer

This AI Readiness Checklist is a general informational tool and does not constitute legal, compliance, security, or investment advice. Every organization's situation is unique, and results will vary by industry, regulatory environment, and technology landscape. The checklist is intended as a starting point for internal discussion, not as a formal assessment or certification of AI readiness.

New Resources Consulting welcomes the opportunity to discuss your organization's specific circumstances and questions in more detail. If you would like to explore how NRC's AI Solutions Group can help you build a practical AI strategy, improve readiness, or execute high-value AI initiatives, please contact us to schedule a brief introductory call.

About New Resources Consulting

New Resources Consulting (NRC) is an IT consulting firm based in Wisconsin, serving mid-market and larger enterprises across the Midwest and beyond. Our AI Solutions Group helps organizations move from AI interest to measurable business impact through:

- AI strategy development and readiness assessments
- AI Innovation Workshops for leadership alignment
- Use case identification and prioritization
- Rapid prototyping and proof-of-concept execution
- AI governance framework design
- Production implementation and ongoing support

We understand the realities many organizations face: tight budgets, lean teams, and the need to balance innovation with operational stability. Our approach is practical, business-driven, and focused on delivering ROI quickly.

Contact: Visit newresourceconsulting.com or reach out to discuss your AI journey.