



// AI\_READINESS

# AI-Readiness Checklist

Are you ready for your first AI pilot?

Your organization has potential for AI, but there are a few things to arrange before starting a pilot.

Go through this checklist to ensure your first AI experiment has the best chance of success.



// STEP 1

## Data Inventory

Do you know what data you have and where it is?

I know which data sources are relevant for my pilot idea (CRM, ERP, documents, etc.)

I know where this data physically resides (cloud, on-premise, external system)

An owner has been assigned per data source

Data quality is sufficient (no major pollution, missing fields, duplicates)

Data is exportable or accessible via API

**Tip:** No perfect data needed, but you need to know what you have.

Start with a small, clean dataset for your pilot.



// STEP 2

## Process Mapping

Do you understand the process you want to improve?

I have chosen a concrete process (not "something with AI", but specific)

I can describe the current process in 5-10 steps

I know where the pain points are (time-consuming, error-prone, tedious)

I know who currently performs this process and how often

I can explain what "better" looks like (faster, more accurate, more consistent)

**Tip:** Choose a process you already have a grip on. Automating a messy process results in automated mess.



// STEP 3

## Privacy & Security

Are you allowed to use this data for AI?

I know if the data contains personal data (GDPR-relevant)

I have checked if data can be sent to external AI services (or must be anonymized)

I know which data absolutely cannot leave the organization

There are agreements about which AI tools may be used

IT/Security is involved or informed about the pilot plan

**Tip:** Ask about this early. Nothing worse than a pilot that stops because privacy was not discussed.



// STEP 4

## Stakeholders

Who needs to be involved?

There is an owner/sponsor driving the pilot

End users (who will use it) are involved

There is budget or commitment to do a pilot

Management is informed and supports it

Someone with technical knowledge is available (internal or external)

**Tip:** Involve end users early. They know where the real pain is and determine if it will be adopted later.



## // STEP 5

# Success Criteria

How will you know if it works?

I have formulated concrete goals (e.g., 50% faster, 80% accurate)

I know how I will measure this (before/after comparison, sample)

I have a timeframe in mind (e.g., 4-6 weeks pilot)

I know when the pilot is "successful" and when we stop

There is a plan for after the pilot (further develop, scale, or learn and stop)

**Tip:** "It just needs to work" is not a criterion. Be specific, then you can actually learn from the pilot.



// SUMMARY

## Ready for your pilot?

### Everything checked?

You are ready to start an AI pilot. Schedule a conversation to work out your idea concretely.

### Still a few points open?

Focus on those first. A well-prepared pilot has a much better chance of success than starting quickly.

### Much still unclear?

Then first check out the AI-Transformation Roadmap to build a stronger foundation.

## Need help?

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