

THE NEXA SOLUTIONS

AI Automation · AI Agents · Websites · Digital Marketing

AI Readiness Checklist

38 checkpoints across data, systems, team, process, and governance — so you know exactly where you stand before starting an AI initiative.

A free checklist from The Nexa Solutions · thanexasolutions.com

How to Use This Checklist

Most AI projects that stall don't fail because the technology didn't work — they fail because something foundational (messy data, no clear owner, an undefined success measure) wasn't in place before the project started. This checklist walks through the six areas worth checking first.

Go through each section and check off what's genuinely true today, not what will be true “soon.” Sections with a lot of unchecked items point to exactly where to focus before (or instead of) moving forward with an AI initiative.

Scoring guide

30+ checked — You're ready to start a pilot project now.

18–29 checked — Pick one or two weak sections to shore up first, then start small.

Under 18 checked — Focus on foundations (data and process) before bringing AI into the picture.

SECTION 1

Data Readiness

6 items

- ☐ **We know where our relevant business data actually lives.**
Customer records, transaction history, support tickets — you can point to the specific systems that hold it.
- ☐ **Our data is stored digitally, not on paper or in disconnected spreadsheets.**
AI systems need machine-readable data; a filing cabinet or an un-synced spreadsheet doesn't count.
- ☐ **The data we'd use is reasonably accurate and up to date.**
Garbage in, garbage out — stale or inconsistent data undermines any AI system built on top of it.
- ☐ **We can export or access this data through an API, file export, or direct database access.**
If the only way to get data out is manual copy-paste, that's a blocker worth solving first.
- ☐ **We've identified what's missing rather than assuming we have everything we need.**
Most teams overestimate how complete or clean their data actually is until they look closely.
- ☐ **We have at least a few months of historical examples of the task we want AI to help with.**
Even a modest history of past tickets, emails, or transactions makes AI systems dramatically easier to set up well.

SECTION 2

Systems & Integration Readiness

5 items

- ☐ **Our core business tools (CRM, helpdesk, e-commerce platform) support integrations or have an API.**
Most modern SaaS tools do — but it's worth confirming before assuming.
- ☐ **We know who has admin access to connect a new tool to our existing systems.**
Integration work often stalls waiting on someone with the right permissions.
- ☐ **We're not relying on a single deeply customized legacy system that resists integration.**
Older, heavily modified in-house systems are the most common source of integration headaches.
- ☐ **We have (or can get) a sandbox or test environment to try changes safely.**
Testing against live customer data from day one raises the stakes unnecessarily.
- ☐ **We have a rough sense of our current software budget and appetite for a new monthly tool cost.**
Avoids discovering a budget blocker after the technical work is already underway.

SECTION 3

Team & Skills Readiness

5 items

- ☐ **At least one person is willing to own this project end-to-end.**
Without a named owner, AI initiatives tend to stall after the initial enthusiasm fades.
- ☐ **That person has time allocated, not just a title.**
“Whoever has time” usually means no one actually does.
- ☐ **Our team is generally open to changing how a task is done, not just adding a tool on top of the old way.**
Resistance to changing the underlying process is a bigger blocker than any technical limitation.
- ☐ **We’ve told the people whose work will change what to expect and why.**
Surprise automation of someone’s daily task is the fastest way to create quiet resistance.
- ☐ **We have (or can get) basic technical support — internal or outside — for anything beyond point-and-click setup.**
Not every business needs a developer on staff, but someone needs to be reachable when something breaks.

SECTION 4

Process & Use Case Readiness

5 items

- ☐ **We can describe the specific task we want AI to help with in one or two sentences.**
“Use AI for customer service” is not a use case. “Draft first-response replies to shipping status questions” is.
- ☐ **We’ve confirmed this task happens often enough to be worth automating.**
See the readiness check in our Business Automation Starter Guide for how to measure this.
- ☐ **The current process, done manually, is reasonably consistent — not different every time.**
Automating a chaotic process just produces chaos faster.
- ☐ **We know what a human currently does when this task goes wrong or hits an edge case.**
AI systems need the same escalation path for cases they can’t handle confidently.
- ☐ **We’ve agreed on what “success” looks like for this specific use case before starting.**
A measurable target (response time, accuracy rate, hours saved) prevents an endless, undefined pilot.

SECTION 5

Governance, Privacy & Risk Readiness

5 items

- ☐ **We know whether the data involved includes any customer PII or sensitive information.**
This determines what privacy and security requirements apply to the project.
- ☐ **We've checked whether our industry has specific regulatory requirements for AI or automated decisions.**
Healthcare, finance, and a few other sectors have specific rules worth checking before building anything customer-facing.
- ☐ **We have a plan for what happens if the AI system gives an incorrect or inappropriate response.**
A review step, an escalation path, or a way to quickly disable the system if needed.
- ☐ **We've decided whether customers need to be told they're interacting with an AI system.**
Increasingly expected as a matter of trust, and required by law in some jurisdictions.
- ☐ **Someone has reviewed the data-handling terms of any third-party AI tool we're considering.**
Understanding where your data goes and how it's used is worth ten minutes before signing up.

SECTION 6

Budget & Timeline Readiness

4 items

- ☐ **We have a rough budget range in mind, even if it's not finalized.**
Prevents wasted time evaluating options far outside what's actually feasible.
- ☐ **We're planning for an initial pilot, not a full company-wide rollout on day one.**
Smaller, faster pilots surface problems while they're still cheap to fix.
- ☐ **We have a realistic timeline in mind (weeks, not days) for a first working version.**
Even simple integrations take longer than expected once real data and edge cases show up.
- ☐ **We've budgeted for at least light ongoing maintenance, not just the initial setup.**
AI systems need occasional review and updates as your business and their content change over time.

How The Nexa Solutions can help

If this checklist surfaced a few gaps, that's normal — most businesses have some. We help teams close the specific gaps that matter for their use case and build the first pilot once they're ready. Visit thanexasolutions.com/contact to book a free consultation and walk through your results.