

# AI & Automation Readiness Scorecard

A 10min assessment to spot where workflows, tools, automation and AI can save time.

## Score each statement:

0 = No / not true yet • 1 = Sometimes • 2 = Yes / consistently true

## How to use

Work through the 20 statements and tick 0 / 1 / 2 for each one. Total your score at the end.

Use the score bands to understand where to focus first (workflow clarity, tool adoption, automation, or AI controls).

If you'd like a second pair of eyes, book a call and share your score. I'll suggest the top 3 priorities.

## Score bands (out of 40)

0–12 Not ready yet. Clarify workflows and document first.

13–24 Early readiness. Tighten approvals, handoffs and visibility.

25–32 Ready to automate. Strong candidates for real time savings.

33–40 Strong foundation. Positioned for scalable automation + AI.

# Scorecard Questions 1–10

Tick one option per row.

**Score each statement:**

0 = No / not true yet • 1 = Sometimes • 2 = Yes / consistently true

	0	1	2
1) We can clearly describe where work starts, where it ends, and what “done” means.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2) Ownership is clear at each stage (no ambiguous “someone should...” steps).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3) Most core processes are well documented, saved in a shared place, have a clear owner, and are updated regularly.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4) Exceptions are defined (what happens when something is blocked, urgent, or off-process).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5) Approvals have clear rules: who approves what, and by when.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6) Reviews are captured in one place (not scattered across email/Slack/docs).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7) If an approval stalls, there is a consistent follow-up method (reminders/escalation or agreed nudges).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8) Handoffs between people/teams happen in a defined way (not ad hoc messages).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9) The team has a reliable view of work in progress, blockers, and next steps without status chasing.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10) Reporting is mostly repeatable and low-effort (not rebuilt manually every week/month).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# Scorecard Questions 11–20

Tick one option per row.

**Score each statement:**

0 = No / not true yet • 1 = Sometimes • 2 = Yes / consistently true

	0	1	2
11) Most people in our org use a project management tool as part of their day-to-day work.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12) Our Project Management tool is used consistently enough that it reflects reality (not “half the work lives elsewhere”).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13) People use more than the basics (templates, forms, automations, dashboards, tool integration, etc).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14) Key decisions and context live with the work (briefs, approvals, assets, links) rather than being scattered.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15) We can identify 1–3 recurring workflows that are stable enough to automate (clear inputs, steps, owners).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16) We know what “good output” looks like and how we would monitor accuracy over time (quality checks, error handling, maintenance).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17) AI is integrated into the workflow (embedded in the process), not used as a standalone side tool.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18) AI outputs are captured and stored in the same place as the work (trackable, reusable, reviewable).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19) There is an agreed human review step for AI outputs where it matters (quality control built into the flow).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20) The organisation actively improves AI output over time (feedback loops, prompt/version updates, examples of good vs bad).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Total score: \_\_\_\_ / 40