

DO IT YOURSELF

AI Readiness Assessment & 90-Day Roadmap

The exact scoring framework and roadmap structure we use with every client. Score five areas of your business, rank your opportunities honestly, and turn the result into a plan you can start on Monday.

How to use this template

- 1 Score each of the five areas from 1 to 5. Be honest — an inflated score costs you three months.
- 2 Add up your total out of 25. That is your AI Readiness Score and your baseline.
- 3 List every opportunity you can see and rank each one by expected impact and implementation difficulty.
- 4 Pick your first three. Quick wins first, depth second.
- 5 Fill the 90-day roadmap and give every phase an owner and a date.

Scoring rubric

Apply the same 1–5 scale to every area, so the scores stay comparable.

1 — Manual	Everything is done by hand. No documentation, no tooling.
2 — Aware	The problem is understood, but nothing has been implemented.
3 — Piloting	Some tools in use, inconsistently, by a few people.
4 — Integrated	Automation is part of the standard workflow and is adopted by the team.
5 — Compounding	Systems are measured, improved and feeding each other data.

The five areas

Each area scored 1–5. Total AI Readiness Score out of 25 — it tells you where you are and where to focus first.

AREA	WHAT TO LOOK AT	WHAT GOOD LOOKS LIKE	SCORE
Operations	Repetitive processes, system efficiency, manual tasks	Automated workflows, data flowing without human touch	☐ /5
Sales & Marketing	Lead generation, outreach, content production, pipeline	AI-assisted content, automated qualification, predictive pipeline	☐ /5
Customer Success	Onboarding, support volume, retention	Self-service support, AI onboarding, proactive retention	☐ /5
Data & Knowledge	Documentation quality, knowledge accessibility	Centralised, AI-searchable knowledge base, always current	☐ /5
Team Capacity	Time allocation, bottlenecks, cognitive load	Team on high-value work, AI handles the repetition	☐ /5
Total	Your AI Readiness Score		☐ /25

5 – 11

Foundations first

12 – 18

Ready to automate

19 – 25

Ready to scale

Step 2 · Opportunity map

List every opportunity you can see. Score impact and difficulty 1–5, then sort by impact minus difficulty. What sits at the top is where you start.

OPPORTUNITY	AREA	HOURS SAVED / MONTH	IMPACT	DIFFICULTY

90-day roadmap

Three phases. Quick wins first, then depth. Every phase gets an owner and a date, or it does not happen.

PHASE	FOCUS	WHAT SHIPS	OWNER
Days 1–30 Quick wins	The two highest impact, lowest difficulty items		
Days 31–60 Depth	Integrations and the workflows behind the wins		
Days 61–90 Compounding	Measurement, adoption, and the next wave		

Tool stack

Match a tool to a workflow — never the other way around. Any tool without a named owner and a workflow gets cut.

WORKFLOW	TOOL	COST / MONTH	OWNER

Three questions before you start

Who owns adoption?

Tools do not fail technically. They fail because nobody was responsible for people using them.

What are you measuring?

Pick one number per opportunity — hours saved, response time, conversion — and record the baseline now.

What happens when it is wrong?

Every automation needs a human check on the output that matters most.

Where does the data live?

Know what leaves your systems before it leaves them.