

AI Readiness Scorecard + Governance Checklist

Domain Methods

HOW TO USE THIS WORKSHEET

Use this scorecard in a 30-minute leadership or RevOps review before you buy a tool, approve a pilot, or promise an AI workflow to the business.

- Pick one specific use case. Example: lead routing, churn-risk prioritization, forecast commentary, lifecycle enrichment, or anomaly triage.
- Score each dimension from 0 to 4. 0 means not usable. 4 means strong enough for a narrow production workflow with a clear owner.
- Mark any dimension below 2 as a trust risk that needs a fix plan before launch.
- Decide whether the right next move is fix first, launch with caveats, or proceed with a narrow pilot.

SCORE THE FIVE READINESS DIMENSIONS

1. Data quality: Are the source records complete, deduplicated, timely, and reliable enough for this workflow?
2. Definition trust: Would marketing, sales, finance, and data describe the key fields and metrics the same way?
3. Workflow fit: Does the output land in a queue, task list, or operating cadence people already use?
4. Governance and ownership: Is there a named owner for field changes, exceptions, and what happens when the output is wrong?
5. Safety and reversibility: If the workflow makes a bad recommendation, how visible and recoverable is the downstream damage?

DECISION GUIDE

- Mostly 0s and 1s: stop and fix the foundation before you call this an AI project.
- Mostly 2s: directional-only use is possible if a human reviews every action and caveats are explicit.
- Mostly 3s and 4s: run the smallest credible pilot with a named owner, monitoring plan, and rollback path.

GOVERNANCE CHECKLIST

- Named workflow owner:
- Source systems involved:
- Fields that break trust first:
- Human review required before action? yes / no
- What happens if the output is wrong or stale?
- Next decision date: