

How ready is your business *for AI?*

TEN QUESTIONS · FIVE MINUTES · ONE HONEST NUMBER AT THE BOTTOM

Most companies find out they weren't ready for AI about three months into the pilot — when the data turns out to be in someone's inbox, or nobody on the team actually wants to use the tool. This saves you those three months. **Answer honestly — the lowest score is the most useful one.**

01 · Clarity of pain

Pick the workflow you'd point AI at tomorrow.

- ☐ 0 We'd need to sit down and figure that out first.
- ☐ 1 We have two or three candidates but haven't decided which hurts most.
- ☐ 2 One specific workflow, and we can name the hours per week it costs.

03 · Process hygiene

If a new hire joined Monday, how would they learn this workflow?

- ☐ 0 Shadow someone for weeks. It mostly lives in people's heads.
- ☐ 1 Some docs, some Slack threads, and a lot of "ask Sarah".
- ☐ 2 It's written down, followed in practice, and we could hand it over cleanly.

05 · Daily user

Who on your team would open this tool every day?

- ☐ 0 Not sure yet — we'd figure out the owner later.
- ☐ 1 A likely candidate, but they haven't been asked.
- ☐ 2 A named person who wants it, and has time carved out to use it.

07 · IT reality

If you needed read access to your CRM or document store next week?

- ☐ 0 Raise a ticket; it would sit for weeks.
- ☐ 1 We could probably get it, but it'd take conversations.
- ☐ 2 We — or someone we trust — can grant it the same day.

09 · Expectation

"If this works, in six months it will have..."

- ☐ 0 ...replaced a role or headcount.
- ☐ 1 ...made the team faster in ways we'll feel but can't yet measure.
- ☐ 2 ...removed a specific number of hours of grunt work so the team does more judgement-heavy work.

02 · Motivation

Why are you looking at AI now, and not last year?

- ☐ 0 Everyone's talking about it and we don't want to fall behind.
- ☐ 1 A competitor or client mentioned it and we got curious.
- ☐ 2 A specific cost or bottleneck hit a level we can't ignore.

04 · Data access

Where does the data this workflow needs actually live?

- ☐ 0 Email threads, shared drives, and spreadsheets nobody fully trusts.
- ☐ 1 Mostly in one or two systems, with gaps filled by exports and copy-paste.
- ☐ 2 In systems we own, with APIs or exports we've used before.

06 · Sponsorship

Who in management is sponsoring this, and how visibly?

- ☐ 0 Nobody explicitly. It's a side interest.
- ☐ 1 One leader is behind it; the rest are neutral.
- ☐ 2 Budget and calendar time are already allocated from the top.

08 · Data posture

What's your stance on data leaving your systems?

- ☐ 0 We haven't discussed it. It would become an issue later.
- ☐ 1 We have instincts but no written policy.
- ☐ 2 We know which data can go where, and who signs off.

10 · Tolerance

What happens if the first version is only 70% right?

- ☐ 0 We'd consider it a failed pilot.
- ☐ 1 We'd be disappointed but keep going.
- ☐ 2 We'd expect that, and we know who reviews the other 30%.

SCORE
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0 - 7 POINTS

Exploring.

You're curious, which is the right start, but the inputs aren't in place yet. Next step: pick one painful workflow and document it for a week before anyone writes a line of code.

8 - 14 POINTS

Shaping.

You know where the value is, but gaps in data access, sponsorship or a daily user will stall a pilot. Next step: fix the weakest axis before scoping the build.

15 - 20 POINTS

Shipping.

Ready for a scoped pilot. The risk now is overbuilding. Next step: ship a narrow first version in weeks, not months, and iterate on real use.

*If you want a second opinion on where you actually landed — and whether AI is even the right answer for that workflow — **we do 30-minute calls**. No pitch deck. If it's not the fit, we'll say so.*

TALK TO US

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