
— FREE GUIDE

AI Readiness Checklist for Businesses

20 quick questions to find out whether your business is ready for AI agents, RAG and automation — and where to start. Tick each statement that is true for you.

1 Strategy

- ☐ We can name 2–3 business problems AI should solve, with a measurable goal for each.
- ☐ A senior person owns AI adoption and has time to drive it.
- ☐ We know which processes are repetitive, high-volume and rule-heavy.
- ☐ We have a budget for a small pilot before a large rollout.

2 Data

- ☐ Key data (customers, products, documents) is digital and in a few known places.
- ☐ Documents and knowledge are reasonably up to date and organised.
- ☐ We know who can access which data, and why.
- ☐ We can export data from our main systems through APIs or files.

3 Processes

- ☐ The workflows we want to automate are documented, even roughly.
- ☐ We know how long these tasks take today, so we can measure savings.
- ☐ There is a clear point where a human reviews or approves AI output.
- ☐ Our main tools (email, CRM, accounting, storage) can be connected.

4 People

- ☐ Staff understand what AI will and won't do in their roles.
- ☐ At least one person per team is keen to test and give feedback.
- ☐ We have a plan to train people on new AI tools.
- ☐ Leadership is comfortable starting small and iterating.

5 Governance & security

- ☐ We have (or will create) a simple AI usage policy.
- ☐ We know which data must never be sent to external AI services.
- ☐ AI actions and outputs can be logged and audited.
- ☐ We have considered privacy laws such as India's DPDP Act and GDPR.

Your score

0–8 ticks — Foundations first. Start with data clean-up, one documented process and a simple AI policy.

9–15 ticks — Ready for a pilot. Pick one high-volume workflow and run a 4–6 week AI pilot with clear metrics.

16–20 ticks — Ready to scale. Move to AI agents and RAG across teams, with governance and monitoring in place.

Next steps

Want a second opinion? Send us your answers and we'll suggest the first AI project likely to give you the best return. Email hello@cardzo.co.in or visit cardzo.co.in/contact.

© Cardzo Entertainment LLP · cardzo.co.in · AI agents, RAG pipelines, websites & apps, Digital Marketing and IT Consulting.