PARTICIPANT WORKSHEET

AI Ready or Risky?

AI Initiative Readiness Workbook [1]

THE PROBLEM OR OPPORTUNITY

What business challenge or opportunity are you exploring, and how might AI help?

Attendee

Name: _____

Title: _____

Org: _____

Examples: Internal knowledge search • Document review • Customer support • Reporting • Workflow automation • Compliance • Research • Operations

PRIMARY READINESS CHALLENGE + CURRENT STAGE

PRIMARY READINESS CHALLENGE:

- ☐ Business Value and ROI
- ☐ People Readiness
- ☐ Data Readiness
- ☐ Governance and Access
- ☐ Not yet sure
- ☐ Other _____

CURRENT STAGE:

- ☐ Considering
- ☐ Planning
- ☐ Piloting
- ☐ Implementing
- ☐ Scaling

STRATEGIC ALIGNMENT + VALUE

If this initiative succeeds, what value could it create?

- ☐ Save time
- ☐ Reduce manual work
- ☐ Improve decisions
- ☐ Improve customer or employee experience
- ☐ Reduce risk
- ☐ Grow revenue
- ☐ Move faster
- ☐ Other _____

What organizational goal or strategic priority does this support?

[1] Guided by Northeastern University's TRIAD™ Framework: Targeted Review for Impact, Alignment & Delivery of AI Opportunities

Keep this card with you throughout the event. Each session will help you complete another section.

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Is Your AI Initiative Ready to Scale?

Use the prompts below during each discussion. There are no perfect answers.
The goal is to leave with greater clarity and a practical next step.

1 BUSINESS VALUE + SUCCESS

What business outcome(s) would make this initiative worth scaling?

How will you measure success, and over what time frame?

Expected value: ☆ ☆ ☆ ☆ ☆

Expected complexity: ☆ ☆ ☆ ☆ ☆

2 PEOPLE + IMPLEMENTATION READINESS

Who will use this? Do we understand their workflow and what will be required for adoption?

Who will own, approve and champion this initiative?

What is the most likely path?

- ☐ Build internally
- ☐ Buy an existing solution
- ☐ Partner for expertise or delivery
- ☐ Combine approaches
- ☐ Unsure
- ☐ Other _____

What skills or support will be needed to implement, evaluate and maintain it?

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3 DATA READINESS

What data is needed, where is it, who owns it, and can it be accessed and used?

Does the data include ground truth? How was it produced, and what is its expected error rate?
Human-annotated, rule-derived, system-generated or another method

How much data is available, and how far back does it go? Is it sufficient and representative for this use case?

Is the data subject to drift? If so, how will changes be detected and managed?

Does it involve sensitive or regulated data? ☐ Yes ☐ No ☐ Unsure

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4 RISKS + GOVERNANCE

Model / system risks

- [ ] Acts on its own, without a human checking before something happens
- [ ] Makes decisions that are hard to reverse once made
- [ ] Touches sensitive, regulated, or otherwise protected data
- [ ] Influences outcomes for people (hiring, credit, access, care)
- [ ] Works in a way that's hard to explain, even to its own builders

Organizational Requirements

- [ ] Clear checkpoint for a human to catch problems before they happen
- [ ] A way to roll back or override a mistake
- [ ] Compliance ownership for the relevant law or standard is clear
- [ ] An established procedure to explain the output to the person it affects
- [ ] Accountability for a bad outcome is clearly assigned at each relevant stage

What is the most important risk and how will it be reduced?

EARLY RISKS OR CONSTRAINTS

- [ ] Unclear business value or ROI
- [ ] Insufficient or unreliable data
- [ ] Lack of stakeholder support or adoption
- [ ] Limited internal skills or capacity
- [ ] Privacy, IP, legal or compliance concerns
- [ ] Vendor, integration or deployment challenges
- [ ] Unclear ownership
- [ ] Not sure where to start
- [ ] Other _____

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MY BIGGEST INSIGHT TODAY

MY NEXT STEP

- [ ] Clarify the problem or desired outcome
- [ ] Validate the business case
- [ ] Engage stakeholders or end users
- [ ] Assess or prepare the data
- [ ] Compare build, buy and partner options
- [ ] Strengthen governance
- [ ] Run a pilot or proof of concept
- [ ] Meet with an expert
- [ ] Other_____

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