



The AI Readiness Checklist

The step-by-step of getting your team ready for AI deployment and success

Instructions: Work through this checklist top down with your team, checking off to-dos and filling in information as needed.

Before you start rolling out Microsoft Copilot to your whole team, you need a plan. We talk to many companies who rush to deploy AI, then don't see the adoption, productivity gains, and ROI they're looking for. Here's our proven, step-by-step checklist for preparing your workforce to adopt AI.

TO DOS

Identify your AI executive team

Align on roles and responsibilities

Kick off your AI adoption initiative with the core team

STEP 1

Build your AI executive team

Before you roll out AI, you need to be clear who's owning it. That means identifying three key roles:

AI Executive Sponsor

This is the executive – likely your CEO – responsible for promoting and mandating AI adoption and usage. This executive needs to be truly bought into AI as a transformative tool, and they need to lead by example in using it.

Their core responsibilities:

- Consistently and enthusiastically express your company's point of view on AI
- Encourage or mandate adoption of AI across the org
- Earmark budget for AI and greenlight AI investments

CTO

This is either your existing CTO, or a CTO role appointed specifically to manage AI. This will be your lead in buying or building your AI solution.

Their core responsibilities:

- Help choose and purchase platforms
- Integrate platform with your existing tech stack
- Manage platform security
- Lead custom development as needed

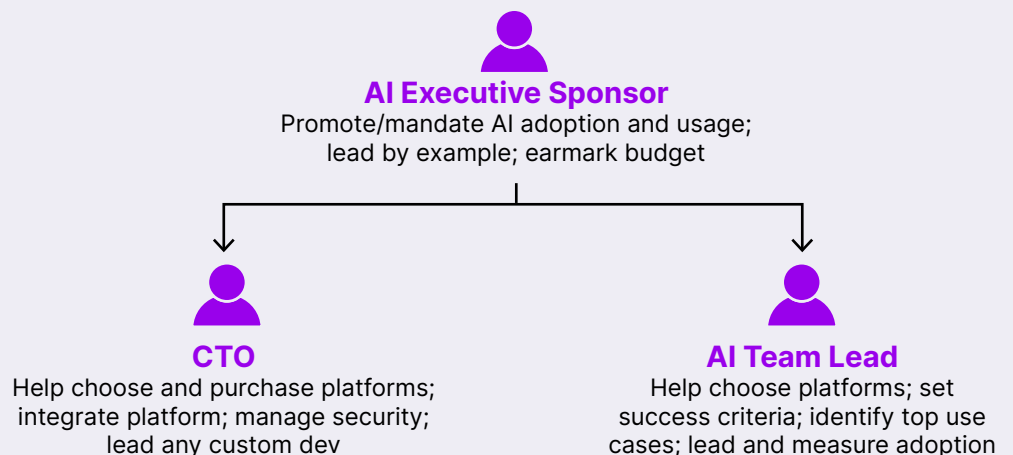
AI Team Lead

This is the non-executive who will take on the brunt of the nitty-gritty work, from setting success metrics to identifying your best use cases.

Their core responsibilities:

- Assist the CTO in choosing a platform
- Set success metrics for adoption and use
- Identify top use cases within the company
- Measure adoption

Note: If you make your Chief People Officer the executive sponsor, ensure that they have strong support from the rest of the executive team so that AI adoption isn't seen as a compliance task.



STEP 2

Establish your business objectives

Teams are most successful with AI when they have a clear idea of what to use it for. We call the three AI modes optimize, accelerate, and transform, and they'll help you determine whether you're using AI to speed up processes, improve your service, or create something net new.

TO DOS

Identify your "AI operating mode"

Align your operating mode to core business objectives

	OPTIMIZE Make internal efforts more efficient	ACCELERATE Improve your current product or service	TRANSFORM Create a new product or service line
Who's it for?	Almost 100% of every team/org	30-50% of orgs	10% of orgs
Why operate in this mode?	Opportunities to optimize in every business, regardless of industry or resources	You have a product or service that can be enhanced by AI	You're facing a big threat or opportunity due to Gen AI
What do you need?	<ul style="list-style-type: none"> Internal (employee) buy-in Off-the-shelf AI (some budget) AI guardrails and training 	<ul style="list-style-type: none"> Product/tech buy-in Customer readiness to use AI Internal bandwidth and budget for AI features 	<ul style="list-style-type: none"> Threat of AI to your team/function/brand Significant resources available for investment

Once you've identified an operating mode, write down the business objectives that align with that mode. For example, if you're in optimize mode and your budgets are tight, you might say, "Improve support turnaround times by increasing support team capacity."

Operating mode	Business objectives
<i>Ex. Optimize</i>	<i>Ex. Improve support turnaround times by increasing support team capacity</i>

STEP 3

Write down your AI “manifesto”

Rolling out AI to your team can cause anxiety and stress. Employees may be thinking, “Will AI replace me?” or simply, “How am I expected to use this?”

To help ease the transition, start by writing down your AI manifesto. This isn’t an AI policy – rather, it’s a point of view on how AI will augment your existing operations and team, and how your team should think about the role of AI in their work. Writing down this manifesto will help you communicate more clearly and consistently about the change.

TO DOS

- Draft your AI manifesto with your core AI team**
- Review the manifesto with a few trusted team members to identify blind spots**

YOUR AI MANIFESTO

The role AI will play in your internal operations

The prompt: What are your expectations for how employees will optimize their internal workflows with AI, and what are the boundaries?

Your POV:

How AI in everyday work changes expectations

The prompt: If you have mandatory AI use cases, outline them here. If employees are expected to figure out their own function specific use cases, lay that out too.

Your POV:

The role AI will play in delivering your product or service

The prompt: How will AI be involved in accelerating or transforming your product or service? Which parts will be AI-enabled, and which should be handled by humans?

Your POV:

Company policies on AI budget and reimbursement

The prompt: Outline how much reimbursement you'll provide for new AI tools, outside of your company-deployed LLM.

Your POV:

The cultural norms and values around working with AI

The prompt: How are you encouraging AI use, when do employees need to disclose AI use, and are people celebrated for AI wins?

Your POV:

Who's in charge of AI initiatives

The prompt: Outline your AI governance: Do you have a head of AI who is in charge of everything? Is it managed on a department-to-department basis?

Your POV:

STEP 4

Assess your team's proficiency

According to our AI Proficiency Report, only 10% of the workforce is proficient at using AI. Before you roll out ChatGPT or Copilot to your team, you need to know whether they can use it effectively – otherwise, you run the risk of AI producing shoddy work or putting your brand at risk.

At Section, we can help you run a custom AI Proficiency Benchmark for your organization. But if you'd prefer to start by yourself, here's an abbreviated version:

- **How many times a month are you using AI?**
- **How do you feel about AI's implications for your job?**
[A) Anxious B) Overwhelmed C) Excited]
- **What should you do if an AI system provides an unexpected or incorrect response?**

In addition to gathering qualitative feedback on AI usage and proficiency, we recommend you interview 2-3 core team members about how they use AI, so you can dig into employee anxieties more deeply and understand any emerging use cases.

TO DOS

Give your team a simple AI assessment

Interview 2-3 core team members about how they use AI

Need more help?

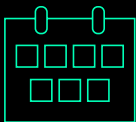
Here's where Section can step in:

- 1** Run an AI Proficiency Benchmark for your company to show you where you are vs. your competitors
- 2** Build a bullet proof change management strategy
- 3** Customize upskilling to your company policies with custom certificates and learning paths

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to learn more



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