



AI Readiness Checklist

for Canadian businesses

28 yes-or-no questions across strategy, processes, systems, privacy and people. About five minutes. Find out where AI and automation will pay off, and what to fix first.

BEFORE YOU START

How to use this checklist

Answer each question for your business as it is today, not as you would like it to be. Tick the box for every **yes**. If the answer is “partly” or “I’m not sure”, leave it blank: those are the gaps worth knowing about. Count your ticks at the end of each section, then add them up on the scoring page.

Privacy note: this checklist stays with you. Nothing is collected or sent anywhere.

SECTION 1 OF 5

Strategy and leadership

Clear goals and ownership decide whether AI pays off.

- ☐ **1. Can you name three tasks your team repeats every week that feel like a waste of skilled time?**

The best first projects are frequent, predictable and well understood.

- ☐ **2. Do you know roughly how many hours those tasks take each week?**

Hours are what turn an idea into a business case.

- ☐ **3. Has leadership agreed what success with AI looks like, in hours or dollars?**

Without a target, pilots drift and nobody can say whether they worked.

- ☐ **4. Is one person accountable for AI and automation decisions?**

When everyone owns it, nobody does.

- ☐ **5. Is there time or budget set aside for improvement work, not just day-to-day operations?**

Even a few hours a month is enough to start, but it has to be protected.

Section 1 score

_____ / 5

Processes

Automation works best on processes you already understand.

☐ **6. Are your most common processes written down, even roughly?**

You can't automate a process nobody can describe.

☐ **7. Do those processes follow the same steps most of the time?**

Consistency is what makes a process automatable.

☐ **8. Do you know where information gets re-typed between systems?**

Re-keying is usually the fastest, safest win.

☐ **9. Do approvals happen somewhere other than email inboxes?**

Approvals buried in email are slow, invisible and hard to audit.

☐ **10. Can you tell how long a request or order takes from start to finish?**

A baseline lets you prove the improvement afterwards.

☐ **11. Are exceptions (the cases that don't fit) handled by a known person or rule?**

Good automations route the exceptions to people instead of breaking.

Section 2 score

_____ / 6

Systems and data

AI is only as useful as what it can reach and trust.

- ☐ **12. Do your main systems (accounting, CRM, line-of-business tools) have integrations or APIs?**

Connected systems are what automation and AI agents plug into.

- ☐ **13. Are important documents in a shared, organized location rather than personal drives or email?**

AI assistants can only answer from content they can find.

- ☐ **14. Do you trust the numbers in your main reports?**

If people don't trust the data, they won't trust what AI does with it.

- ☐ **15. Could you produce a list of your customers from one system?**

A single source of truth makes reporting and automation far simpler.

- ☐ **16. Are file permissions set so people only see what they should?**

Tools like Microsoft 365 Copilot can surface any file a user has access to.

- ☐ **17. Is old or duplicate content archived so it won't be mistaken for current?**

Outdated documents lead AI to give outdated answers.

Section 3 score

_____ / 6

Security and privacy

Canadian privacy law already applies to how you use AI.

- ☐ **18. Does everyone use multi-factor authentication?**
Basic security comes before connecting AI to your business data.
- ☐ **19. Do you know which privacy law applies to you: PIPEDA, Quebec's Law 25, or Alberta or BC PIPA?**
Each sets rules for collecting, using and sharing personal information.
- ☐ **20. Do you know where your business data is stored, and whether any of it must stay in Canada?**
Some contracts, sectors and public bodies require Canadian data residency.
- ☐ **21. Do you know which AI tools staff are already using, including free ones?**
You can't manage risks you can't see.
- ☐ **22. Do you check AI vendors' terms for how they use, store and train on your data?**
Free and business versions of the same tool often have very different terms.
- ☐ **23. If AI makes or influences decisions about people, could you explain how?**
Quebec's Law 25 gives people the right to know about decisions made exclusively by automated processing.

Section 4 score

_____ / 6

People and governance

Adoption and accountability are what make AI stick.

☐ **24. Do you have a written policy on what staff may and may not put into AI tools?**

A short, clear policy prevents most AI privacy incidents.

☐ **25. Have staff had any training on using AI tools well and safely?**

Licences without training usually go unused.

☐ **26. Is there at least one person who is curious and keen to try new tools?**

An internal champion keeps momentum after the first project.

☐ **27. Will staff see automation as help rather than a threat?**

How you introduce it shapes whether people use it.

☐ **28. Would your board, insurer or key clients be comfortable with how you govern AI today?**

They are increasingly asking, and “we haven't thought about it” is a hard answer.

Section 5 score

_____ / 5

YOUR RESULTS

Add up your score

1. Strategy and leadership	_____ / 5
2. Processes	_____ / 6
3. Systems and data	_____ / 6
4. Security and privacy	_____ / 6
5. People and governance	_____ / 5
Total	_____ / 28

What your score means

22–28

Ready to build

You have the foundations. Go straight to automating your highest-value process or deploying an AI assistant on your own content.

13–21

Ready to start

You have the basics. A short assessment will find the quick wins and the few gaps to close first. Look at your lowest-scoring section.

0–12

Start with foundations

Focus on security, a basic AI policy, and writing down two or three key processes. These pay off whatever you do next.

Then look at your lowest-scoring section

Strategy and leadership: Pick one owner and one measurable goal before buying any tools.

Processes: Map your two most repetitive processes on one page each. That map is the automation spec.

Systems and data: Tidy permissions and archive stale content before switching on AI assistants.

Security and privacy: Turn on multi-factor authentication everywhere and list the AI tools already in use.

People and governance: Write a one-page AI use policy and run a short, practical training session.

NEXT STEPS

Turn your score into a plan

Whatever your score, there are usually a handful of strong opportunities and a few gaps to close first. We can help you find both, quickly and at a fixed price.

THE AI KICKSTART

Two weeks. A fixed \$2,500 CAD. A clear plan.

- ✓ We work through this checklist with your team, in depth
- ✓ An opportunity map across every part of your business
- ✓ Your top opportunities scored on value, effort and risk
- ✓ A 90-day roadmap with budget ranges, plus a starter AI use policy

For organizations with up to 50 staff; larger organizations are quoted on scope. Prices exclude tax.

[Book a free 30-minute call](#)

[About the AI Kickstart](#)

The call is free and there's no obligation. You'll leave with at least one idea you can use right away.

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