aranv
Consultancy & Digital Services

aranv.com · (347) 460-9278 · sales@aranv.com

AI Project Readiness Checklist

18 questions to answer before you start an AI project. If you can answer most of them clearly, you are ready for a focused pilot.

1 Goal and value

- [ ] **Can you name the task and the person who does it today?**
  Pick one task with a clear owner, such as answering order status emails, rather than a broad aim like using AI in support.
- [ ] **How will you know it worked?**
  Agree one or two measures before you start, such as time per task, error rate or response time, and record today's figures.
- [ ] **Is the task frequent enough to matter?**
  A task done hundreds of times a month usually pays back faster than a rare one, even if the rare one feels more painful.

2 Process

- [ ] **Is the process written down?**
  If two people would describe the steps differently, agree the process first. AI will copy the confusion.
- [ ] **Where must a person decide?**
  Mark the points that need approval, judgment or a conversation with a customer, so people stay in control.
- [ ] **What happens when it goes wrong?**
  Decide how errors are caught, who fixes them and how the work falls back to the manual process.

3 Data and documents

- [ ] **Do you know where the information lives?**
  List the systems, folders and documents the task depends on, and who owns each one.
- [ ] **Is the information current and consistent?**
  Outdated policies, duplicate records and missing fields lead to wrong answers. Plan a clean-up of the data the pilot uses.
- [ ] **Can the AI see only what it should?**
  Check permissions. A pilot should use only the records and documents the task needs.

4 Systems and integration

- [ ] **Which systems need to be read or updated?**
  Note the CRM, ERP, help desk or file storage involved, and whether each has an API or an export.
- [ ] **Who manages access to those systems?**
  Agree early who can create API keys, service accounts and test environments.
- [ ] **Is there a safe place to test?**
  A sandbox or test copy lets you try the pilot without touching live customer data.

5 Risk, privacy and compliance

- [ ] **Does the task involve personal or confidential data?**
  Identify personal, financial or health information and the rules that apply to it before you choose tools.
- [ ] **Which AI providers and data terms are acceptable?**
  Check whether data may leave your systems, where it is processed and whether it may be used for training.
- [ ] **Who signs off on risk?**
  Name the person who approves the pilot from a security, legal or compliance point of view.

6 People and rollout

- [ ] **Who will use it every day?**
  Involve the people who do the work now. They know the exceptions, and they decide whether the tool gets used.
- [ ] **Who owns it after launch?**
  Someone needs to review results, update instructions and decide on changes once the pilot is live.
- [ ] **What is the smallest useful first release?**
  Start with one team, one workflow and a fixed review period, then decide whether to expand.

Want a second opinion? Book a 30-minute readiness review at aranv.com/contact. We will go through your answers and suggest a realistic first pilot. Offices in Cary, NC and Canton, MI.