



DATA & AI READINESS FIELD GUIDE

Is Your Business Actually Ready for AI?

A quick, honest self-assessment for owners and leadership teams — built from 15+ years running data and technology programs inside IBM, Chase, and Pepsi, sized down for companies that don't have an internal CIO to ask.

The Four Pillars of Readiness

01 Data Architecture <i>Can your systems actually talk to each other, or does everything depend on someone exporting a spreadsheet?</i>	02 Governance & Quality <i>Do you trust the numbers in your reports, or does every meeting start with an argument about whose spreadsheet is right?</i>
03 Team & Talent <i>Is there one person who understands how your systems fit together — and what happens if they leave?</i>	04 AI Use-Case Fit <i>Of everything AI vendors are pitching you, what would actually move revenue, cost, or risk for your business?</i>

Five Warning Signs Worth a Second Look

Check any that sound familiar. Two or more is a signal it's worth a real conversation — not necessarily a big spend, but a clear-eyed look before you commit to one.

- ☐ **Multiple source-of-truth conflicts** — Sales, finance, and ops each report different numbers for the same metric.
- ☐ **Manual data stitching** — Someone spends hours each week combining exports into a master spreadsheet.
- ☐ **Vendor-driven roadmap** — Your technology plan is really just whatever the last vendor pitched you.
- ☐ **No AI prioritization** — You've discussed AI, but no one has ranked which use case would matter most.
- ☐ **Single point of failure** — One person holds the institutional knowledge of how your systems connect.

What Happens Next

A Readiness Assessment isn't a sales pitch for a platform — it's an independent look at where you actually stand across these four pillars, with a plain-language, prioritized plan for what to do first. No obligation, no jargon, and no recommendation to buy something you don't need yet.

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