BRIO

AI IMPLEMENTATION

AI Readiness Scorecard

How ready is your business to get real hours back from AI?

20	10 min	5
Questions	To complete	Areas scored

HOW TO USE THIS SCORECARD

1. Read each statement and circle a score from 1 to 5. Score how things are today, not how you hope they will be.
2. Add up the four scores in each area and write the total in the box at the bottom of the page.
3. Copy your five area totals onto the results page. Your lowest areas show where to start.
4. Use the starter use cases and the first pilot checklist to plan your first AI project.

Tip: be honest about data and adoption. Those are the two areas teams overrate most, and the two that decide whether an AI project saves real time.

1. Use cases

Do you know which job AI should do first, and who owns it?

1 = not true at all 3 = partly true 5 = fully true

#	STATEMENT	YOUR SCORE
1	We can name one workflow where AI would save time, and the person who owns it.	1 2 3 4 5
2	We know roughly how long that workflow takes today, per item or per week.	1 2 3 4 5
3	We have ranked our AI ideas by value, effort, and risk.	1 2 3 4 5
4	A leader has agreed to sponsor a pilot and judge it on a measurable result.	1 2 3 4 5

Use cases total (out of 20) ☐

IF THIS IS A LOW SCORE, YOUR FIRST MOVE

Pick one workflow that happens dozens of times a week, involves reading or writing, and has a clear owner. Time it for two weeks so you have a baseline.

Why it matters: pilots without an owner and a baseline can never prove they worked, so they rarely get funded past the demo.

2. Data quality

Is the information your first use case needs filled in, consistent, and easy to find?

1 = not true at all 3 = partly true 5 = fully true

#	STATEMENT	YOUR SCORE
5	The fields our first use case depends on are filled in for most records.	1 2 3 4 5
6	Those fields mean the same thing to everyone who enters them.	1 2 3 4 5
7	Key information lives in structured fields, not only in notes, attachments, or inboxes.	1 2 3 4 5
8	We know which system is the source of truth for each type of record.	1 2 3 4 5

Data quality total (out of 20) ☐

> **IF THIS IS A LOW SCORE, YOUR FIRST MOVE**
>
> List the 5 to 10 fields your first use case needs and fix those first. You do not need to clean everything; you need the right few fields to be right.

Why it matters: when key fields are empty or inconsistent, AI guesses. Answers drift, and people stop trusting the tool. Clean fields also improve your reports, so this work pays off twice.

3. Systems and integration

Can AI read and write where the work actually happens?

1 = not true at all 3 = partly true 5 = fully true

#	STATEMENT	YOUR SCORE
9	Our core systems (CRM, case management, accounting, documents) have APIs or connectors.	1 2 3 4 5
10	Data moves between our systems automatically, not by export, email, or re-keying.	1 2 3 4 5
11	People could use an AI feature inside the screens they already work in.	1 2 3 4 5
12	We have someone, internal or a partner, who can build and maintain integrations.	1 2 3 4 5

Systems and integration total (out of 20) ☐

> **IF THIS IS A LOW SCORE, YOUR FIRST MOVE**
>
> Map how data moves between your core systems for one workflow. Mark every manual hand-off; those are where both integration and AI will save the most time.

Why it matters: if AI output has to be pasted somewhere by hand, you have moved the work, not removed it.

4. Security and governance

Have you decided what AI may use, who sees its output, and who checks it?

1 = not true at all 3 = partly true 5 = fully true

#	STATEMENT	YOUR SCORE
13	We have decided which data AI tools may and may not use.	1 2 3 4 5
14	Our AI tools do not train on our data, and we can show where data flows.	1 2 3 4 5
15	AI access follows the same permissions people already have.	1 2 3 4 5
16	Legal, compliance, and IT have reviewed how we plan to use AI.	1 2 3 4 5

Security and governance total (out of 20) ☐

> **IF THIS IS A LOW SCORE, YOUR FIRST MOVE**
>
> Write a one-page AI use policy: the approved tools, the data they may use, what gets logged, and who reviews output before it reaches a client.

Why it matters: security questions raised late are the most common reason a working pilot never reaches production. A one-page answer now saves months later.

5. People and adoption

Will the people who do the work actually use it, and trust it?

1 = not true at all 3 = partly true 5 = fully true

#	STATEMENT	YOUR SCORE
17	The people who do the work today help choose and test AI tools.	1 2 3 4 5
18	Someone owns training, feedback, and adoption for each AI tool.	1 2 3 4 5
19	Users can see where an AI answer came from and flag a wrong one.	1 2 3 4 5
20	Our team sees AI as help with their work, not a threat to it.	1 2 3 4 5

People and adoption total (out of 20) ☐

> **IF THIS IS A LOW SCORE, YOUR FIRST MOVE**
>
> Bring two or three daily users into the pilot from day one. Show them where each answer came from, and give them a one-click way to flag a bad one.

Why it matters: adoption is the difference between a tool that exists and a tool that saves hours. People keep using what they can check.

Your results

Copy each area total below, then read the rating. Your three lowest areas are the three moves that will matter most.

AREA	YOUR TOTAL (OUT OF 20)	RATING
1. Use cases		
2. Data quality		
3. Systems and integration		
4. Security and governance		
5. People and adoption		

How to read your totals

AREA TOTAL	RATING	WHAT IT MEANS
4 to 9	Start here	This area is your first project, often before any AI is built. Use the first move on that area's page.
10 to 14	Getting there	Workable for a small pilot. Fix the lowest-scoring statements as part of the pilot plan.
15 to 20	Ready to build	A strength you can build on. Lean on this area when you choose your first use case.

Your three moves

Write the first move from each of your three lowest-scoring areas.

1.

2.

3.

Starter use cases

The best first AI projects are frequent, text-heavy, guided by rules a good employee could explain, and already inside a system you control.

USE CASE	A GOOD FIT WHEN	WHAT IT DEPENDS ON
Intake and triage	Dozens of new requests arrive each week and someone reads, sorts, and routes each one.	Intake form fields, routing rules
Document summaries	People read long documents to pull out the same few facts every time.	Document storage access, a list of the facts to extract
Answers from your knowledge	Staff ask the same questions about policies, procedures, or products.	Current, approved source documents
Status updates	Someone writes regular updates for clients or leaders from data in your systems.	Consistent status fields and dates
Plain-language reporting	Leaders wait on analysts for answers that already live in your data.	Governed metrics that match your dashboards
Hand-offs between systems	Data is re-keyed between CRM, case management, accounting, or vendor tools.	APIs or connectors, a clear source of truth

First pilot checklist

- [ ] One workflow, with one named owner
- [ ] A baseline: time per item and volume per week
- [ ] An agreed success measure, such as minutes saved per item or errors avoided
- [ ] The fields and sources this workflow needs, checked and fixed
- [ ] Data access and permissions reviewed
- [ ] The AI tool approved under your AI use policy
- [ ] 3 to 10 pilot users named, including people who do the work today
- [ ] A human review step for anything client-facing
- [ ] A simple way for users to flag a wrong answer
- [ ] A review date to compare results against the baseline

Your next step

A scorecard tells you where you stand. An assessment tells you what to build first.

BRIO has spent more than 20 years building and integrating business systems, including Salesforce, Litify, and custom software, for 280+ clients. We are a Claude Partner and a SOC 2 compliant team, and we build AI inside the systems you already run, on data you can trust.

Book an AI Efficiency Assessment

Bring your scorecard. You will leave with a ranked list of use cases, an honest read on your data and systems, and a pilot plan with a scope and a date.

www.gobrio.com/ai-efficiency-assessment

Keep reading

AI for Business Efficiency: where AI saves time, and how we take it from idea to production.

Case studies: AI and data work BRIO has taken to production.