

CHECKLIST

AI READINESS: 17-POINT EXPANDED CHECKLIST FOR IT LEADERS

Build A Secure, Scalable, & Business
-Aligned AI Strategy With Fewer
False Starts



WHY THIS CHECKLIST EXISTS



AI adoption isn't a licensing decision, it's a strategic shift. This guide helps IT decision-makers evaluate readiness across people, process, and technology, and gives your organization a smarter, safer path forward.

Unlike most digital transformation efforts, AI changes the rules in real time.

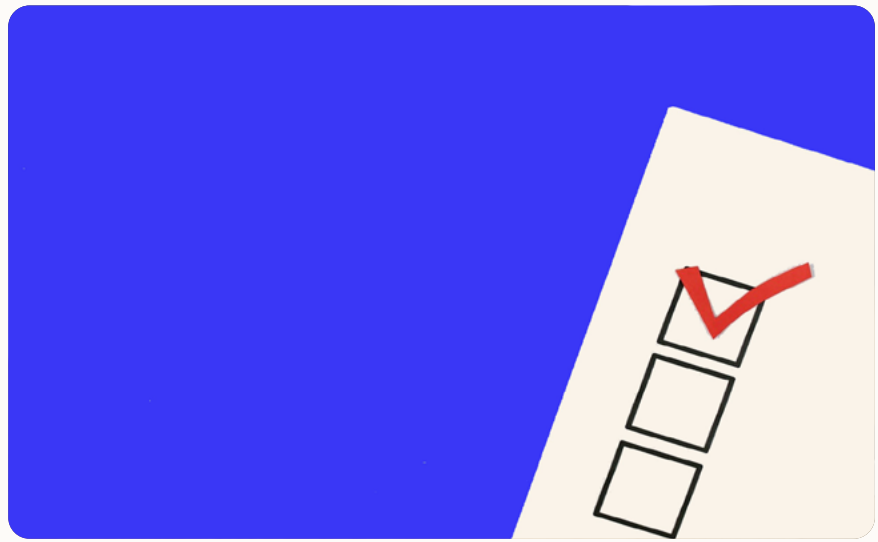
Unlike most digital transformation efforts, AI changes the rules in real time. Your organization needs more than enthusiasm. It needs a roadmap.

This checklist was built to help IT leaders assess readiness from multiple dimensions: technical architecture, governance maturity, user sentiment, and operational flexibility. It's not a guide for buying tools, it's a guide for building strategy.

We've included tactical next steps, example platforms, risk flags, and guidance on what to watch for. Whether you're exploring AI use cases for the first time or aligning your second phase deployment, this checklist can help you move forward with clarity.

You can use it independently or in collaboration with a partner like Hypershift. We've included where and how we support at each step, so you can scale faster and avoid costly missteps.

AI CHECKLIST



1. Baseline Awareness

☐ Survey Employees or Stakeholders About AI Expectations

What To Do:

- 🔦 Deploy an internal survey to gauge sentiment, awareness, and anxiety around AI tools.

How To Do It:

- 🔦 Use survey tools like **SurveyMonkey** or **Typeform** to gather feedback.
- 🔦 Focus on unmet needs, confusion, and existing usage.

Watch out for:

- 🔦 Silence. Many employees use AI but don't report it.

Where Hypershift Can Help:

- 🔦 We design and analyze the survey, surfacing both hidden opportunities and risks.

2. Current State Assessment

☐ Fully Understand Your Tech & Policy Landscape

What To Do:

- ✦ Map your core platforms (e.g., Salesforce, SAP, Oracle, internal legacy systems).
- ✦ Audit infrastructure, access policies, and existing AI usage

How To Do It:

- ✦ Use your platform's admin centers, security centers, and interviews with IT/security leaders.

Watch out for:

- ✦ Outdated documentation or undocumented integrations.

Where Hypershift Can Help:

- ✦ We design and analyze the survey, surfacing both hidden opportunities and risks.

3. Governance & Risk Posture

☐ AI-Ready Your DLP, Access Control, & Usage Policies

What To Do:

- ✦ Review Access Control, DLP (use tools such as data loss prevention solutions and data classification policies).

What To Do (cont.):

- 🔦 Draft AI usage policies and role-based access models.

How To Do It:

- 🔦 Use DLP dashboards, sensitivity labels, and AI policy controls specific to your platforms.

Watch out for:

- 🔦 “One policy fits all” – that doesn’t work with AI.

Where Hypershift Can Help:

- 🔦 We bring a pre-built AI governance template and policy playbook.

4. AI Capability Inventory

☐ Take Inventory of Current AI Usage

What To Do:

- 🔦 Inventory shadow AI tools like ChatGPT, Jasper, or Otter.ai.

How To Do It:

- 🔦 Survey teams; use IT security tools and network logs to identify AI activity by your employee population.

Watch out for:

- ⚠ Overlapping tools; these create confusion and stall deployment efforts.

Where Hypershift Can Help:

- ⚠ We identify usage patterns and unify strategy around what works.

5. Data Integration Readiness

☐ Ensure Your Systems Are Connected & API-Ready

What To Do:

- ⚠ Map data silos, API access, and tool interoperability (e.g., collaboration platforms, CRM, ERP).

How To Do It:

- ⚠ Use API management platforms, integration platforms as a service (iPaaS), or workflow automation tools.

Watch out for:

- ⚠ Integrations that break under scale or expose PII.

Where Hypershift Can Help:

- ⚠ We align your data flow to support secure, usable AI outputs.

6. Use Case Discovery Workshops

☐ Identify Real Use Cases Across Your Company

What To Do:

- 🌟 Run workshops with HR, ops, finance, and CX to brainstorm use cases.

How To Do It:

- 🌟 Use Miro or FigJam with a use-case scoring matrix.

Watch out for:

- 🌟 AI gimmicks with no real business impact.

Where Hypershift Can Help:

- 🌟 We facilitate cross-functional workshops with structured outputs.

7. Prioritized Portfolio

☐ Prioritize the 2 or 3 Highest-Impact AI Use Cases

What To Do:

- 🌟 Score use cases on strategic value, complexity, security impact, and user readiness.

How To Do It:

- 🌟 Use a weighted scoring matrix (we provide one).

Watch out for:

- ⚡ Internal politics skewing prioritization.

Where Hypershift Can Help:

- ⚡ We guide prioritization through a neutral, structured lens.

8. Security & Compliance Controls

☐ Evaluate the Data Risk of Each Use Case

What To Do:

- ⚡ Map each use case against data classification policies.
- ⚡ Set role-based access for sensitive interactions.

How To Do It:

- ⚡ Use your organization's data governance tools, identity and access management (IAM) systems, and auditing tools.

Watch out for:

- ⚡ Non-technical teams bypassing controls unintentionally.

Where Hypershift Can Help:

- ⚡ We align controls with AI deployment planning.

9. Roadmap & Phased Rollout

☐ Create a 6–12 Month Roadmap with Phase Gates

What To Do:

- ☛ Phase initiatives into planning, pilot, and production cycles.

How To Do It:

- ☛ Use project boards (e.g., Jira, Asana, Monday.com).

Watch out for:

- ☛ “Set it and forget it” approaches with no feedback loop.

Where Hypershift Can Help:

- ☛ We build a phased roadmap with built-in governance.

10. Prototype & Feedback Loop (Optional)

☐ Test a Use Case with a Real Prototype

What To Do:

- ☛ Build a demo with internal data and real user interaction.

How To Do It:

- ☛ Use AI development platforms, low-code/no-code tools with AI capabilities, or custom integrations.

Watch out for:

- ⚠ Skipping user testing and assuming it will scale.

Where Hypershift Can Help:

- ⚠ We build, test, and iterate a real prototype with you.

11. Cultural Readiness

☐ Ensure Your Team Is Emotionally & Politically Ready for AI

What To Do:

- ⚠ Identify champions and skeptics.
- ⚠ Run comms campaigns and office hours.

How To Do It:

- ⚠ Use sentiment surveys and internal town halls.

Watch out for:

- ⚠ Fear-based resistance disguised as “not the right time.”

Where Hypershift Can Help:

- ⚠ We help you design change enablement plans.

12. Shadow AI Tool Inventory

☐ Check For Any Unofficial AI Tools In Use

What To Do:

- 🔦 Survey or log-check departments.

How To Do It:

- 🔦 Use endpoint monitoring or surveys (anonymized).

Watch out for:

- 🔦 Security and legal blind spot.

Where Hypershift Can Help:

- 🔦 We help bring shadow tools into the light, or phase them out.

13. Cost-Benefit Modeling

☐ Quantify ROI on Your Top Use Cases

What To Do:

- 🔦 Model cost savings, efficiency gains, or quality improvements.

How To Do It:

- 🔦 Use ROI calculators and performance benchmarks.

Watch out for:

- ⚠ Overestimating gains from automation.

Where Hypershift Can Help:

- ⚠ We help build a business case execs will actually say yes to.

14. Executive Sponsorship

☐ Secure C-level Support Behind the AI Plan

What To Do:

- ⚠ Align AI strategy to business goals and strategic initiatives.

How To Do It:

- ⚠ Present a readiness scorecard & roadmap to leadership.

Watch out for:

- ⚠ Innovation efforts that die in middle management.

Where Hypershift Can Help:

- ⚠ We prep the materials for stakeholder alignment.

15. Internal Communication Plan

☐ Craft a Narrative & Rollout Plan

What To Do:

-  Draft FAQs, email templates, and internal videos.


How To Do It:

-  Partner with HR, comms, and department heads.

Watch out for:

-  Teams thinking AI is just another tool to “do more with less.”

Where Hypershift Can Help:

-  We bring proven messaging frameworks.


16. Prioritized Portfolio

☐ Figure Out Who Can Help or Block AI Initiatives Internally

What To Do:

-  Map data/AI/automation skills across teams.

How To Do It:

-  Use internal skills surveys or manager 1:1s.

Watch out for:

- ⚡ Undiscovered “Excel wizards” who build automation daily.

Where Hypershift Can Help:

- ⚡ We help identify and activate internal champions.

17. Ethics & Reputation Risk Review

☐ Consider the Ethical Implications of Your Use Cases

What To Do:

- ⚡ Review use cases for bias, fairness, and public perception risks.

How To Do It:

- ⚡ Use an AI ethics checklist or scorecard.

Watch out for:

- ⚡ Automating hiring, content, or customer responses without oversight.

Where Hypershift Can Help:

- ⚡ We surface risks early and help you avoid headlines later.

Bonus Tip: Don't Go It Alone

We built this checklist to help IT leaders move forward without the guesswork. If you're ready to assess your environment, align your teams, or test a real use case, Hypershift can help.

We partner with organizations like yours to:

- ✓ Host readiness Assessments & Strategy Workshop.
- ✓ Use Case Prioritization & Prototyping.
- ✓ Governance & Risk Planning.
- ✓ Integration & Operationalization Support.

Ready for a second set of eyes?

Book an AI readiness call and see how we help.

Pro tip: *Print this out. Or better yet, turn it into a team working session.*

ABOUT HYPERSHIFT



We're dedicated to championing businesses' digital evolution. Our team offers top-tier consulting on new and emerging technologies, encompassing enterprise infrastructure, cloud solutions, networking, security, and analytics.

Let us pave the way for your organization to keep moving forward. Our experts are well-versed in both traditional data centers and modern cloud environments. We guide businesses in seamlessly integrating these platforms, ensuring a tailored approach that aligns with their unique objectives.

While we specialize in mid-sized companies, we have partnered with companies of all sizes, including Fortune 100 giants. Our Hypershift managed service division is trusted by over 160 financial institutions. We take pride in being a part of CISA's critical security infrastructure initiative, which helps safeguard organizations.

Our team is our secret weapon. With 6 CCIE-certified engineers (some who've even earned it multiple times) and over 50 experienced consultants, we have the expertise to handle any size organization.



We can confidently manage even the most complex networks with efficiency and precision.

We don't go it alone. With over 70 industry-leading partners, such as Cisco and Nutanix, we offer a comprehensive range of solutions and consulting services.

Let Hypershift be a trusted partner in pushing your organization forward with better technology.

hello@hypershift.com

