

LYTNEX

The AI Readiness Checklist

A practical, 26-point assessment for business leaders deciding whether their company is actually ready for AI automation and AI agents — before signing off on a project.

26

Checklist Items

5

Readiness Categories

10 min

To Complete

Why most automation projects underperform

Most AI and automation initiatives don't fail because the technology doesn't work. They fail because the underlying business — its data, its processes, its people — wasn't actually ready for it. The technology gets blamed; the readiness gap is the real cause.

This checklist is the same lens Lytnex uses internally during the first technical assessment call with a new client. It won't tell you which vendor to pick. It will tell you, honestly, where your organization stands today — and exactly what to fix first so that whatever you build next actually sticks.

70%+

of automation initiatives stall due to data or process issues discovered after launch — not the AI itself.

5

readiness categories: Data, Process, Team, Strategy, and Security & Governance.

1

honest scorecard at the end to tell you exactly where to start.

HOW TO USE THIS

Go through each section with the people who actually run the relevant part of your business — not just leadership. Check a box only if it's genuinely true today, not "true once we fix X." Be honest; this document is for you, not for us.

01 Data & Systems

AI and automation are only as good as the data and systems feeding them.

- We know **where our core business data actually lives** (CRM, ERP, spreadsheets, paper) without needing to ask three departments.

- Our key systems can **exchange data via an API or integration** — not only manual export/import.

- We have at least **6–12 months of historical data** for the process we want to automate or improve with AI.

- Our data is **reasonably clean and consistent** (consistent formats, few duplicates, defined fields) rather than scattered and ad-hoc.

- We know **who owns and can approve changes** to each relevant system.

02 Process & Operations

Automation accelerates a process. It can't fix one that nobody can actually describe.

- We can **describe the target process step-by-step**, including exceptions, without needing five people in the room.

- We know the **volume** involved (transactions, tickets, leads, orders per day/week) for the process in question.

- We've identified the **specific bottleneck** we want to remove — not just "make things faster" in general.

- We have a way to **measure the process today** (time, cost, error rate) so we'll know if a change actually helped.

- Edge cases and exceptions in this process are **documented**, not just "known by Sarah."

03 Team & Change Readiness

The best system in the world fails if the people using it weren't brought along.

- There is **one clear internal owner** for this initiative who can make decisions without a six-person sign-off chain.
- The team whose work will change has been **told why**, not just told what.
- Leadership has agreed on **what "success" looks like** in concrete terms before kickoff.
- We have realistic **bandwidth allocated** internally for testing and feedback — this isn't "fire and forget."

04 Strategy & Goals

Automation is a means, not a strategy. The "why" has to come first.

- We can name the **business outcome** we want (revenue, cost, speed, retention) — not just "we should use AI."
- We've considered whether this should be **solved with AI/automation at all**, versus a simpler process fix.
- We have a rough sense of **budget and timeline expectations** that are grounded in reality, not guesswork.
- We're solving for a problem that will still matter in **12+ months**, not a one-off.

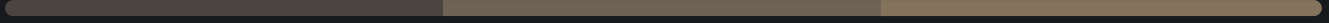
05 Security & Governance

Especially relevant for AI agents and systems that touch customer or financial data.

- We know which data involved is **sensitive or regulated** (customer PII, health, financial) and what rules apply to it.
- We have a process for **granting and revoking system access** — not shared logins with no audit trail.
- Someone in the organization is **accountable for AI/automation decisions** made on the company's behalf.
- We have a plan for what happens if the **automated system makes a mistake** — human fallback, monitoring, alerts.

Score your readiness

Count every box you genuinely checked across all 26 items, then find your range below.



0 – 9 CHECKED · FOUNDATION STAGE

You're not ready to automate yet — and that's a completely normal place to be.

Start with the Data & Systems and Process & Operations sections. Most companies at this stage benefit more from a short technical assessment than from jumping straight into a build — it's far cheaper to fix a process gap on paper than mid-project.

10 – 18 CHECKED · BUILDING STAGE

You have real foundations, with specific gaps worth closing first.

You likely have enough clarity to start a scoped pilot in one area while addressing the unchecked items in parallel. This is the stage where an outside technical partner can save months by pointing out which gaps actually matter and which don't.

19 – 26 CHECKED · EXECUTION STAGE

You're genuinely ready to move — the bottleneck now is execution speed and the right technical partner.

Your risk at this stage isn't readiness, it's choosing a partner who can move at the pace your organization is already operating at, and who designs for scale from day one rather than a brittle first version.

NEXT STEP

Whatever your score, a 20-minute conversation will sharpen it.

Bring this checklist to a free technical assessment call with Lytnex. We'll walk through your specific gaps, tell you honestly whether AI/automation is the right move right now, and outline what a realistic first step would look like — no sales pitch, no obligation.

[Book a Strategy Call →](#)

- 20-minute working session, not a sales call
- We'll review your checklist results live
- You'll leave with a concrete next step either way