

AI Opportunity & Readiness Assessment

Find where AI can create value — and what must be in place to use it well.

A practical working assessment for identifying high-value AI opportunities and the organizational conditions required to pursue them responsibly.

ORIENTATION

Two different questions, asked at the same time

AI opportunity and AI readiness are not the same thing. An organization may have dozens of places where AI could help but lack the information, controls, ownership, or workflow clarity required to implement those ideas well. The reverse can also be true: an organization may have strong technical foundations but no clearly defined problem worth solving.

PART I

Where could AI help?

Identifies where AI could create meaningful organizational value — across repetitive work, knowledge, decisions, foresight, and operations.

PART II

Are we ready?

Evaluates whether the people, processes, data, technology, security, and governance are ready to support it.

> The objective is not a perfect readiness score. It is a clearer decision about what to pursue, what to fix first, and what should wait.

HOW TO USE THIS ASSESSMENT

Five working steps

01 Complete Part I with a cross-functional group rather than a single AI enthusiast.

02 Shortlist opportunities based on business value, feasibility, risk, and measurability.

03 Complete Part II against the highest-priority opportunities.

04 Treat gaps as an action list, not as reasons to abandon AI.

05 Pilot a bounded use case before scaling.

WHO THIS IS FOR

Executives, operations and technology leaders, and the cross-functional group that will own an AI effort — the people who can speak to workflow, information, risk, and accountability.

WHAT YOU'LL PRODUCE

A prioritized opportunity list, a visible set of readiness gaps, and a short action plan naming the owner, the first pilot, and how success will be measured.

INSIDE

Part I — Where could AI help?

Opportunity shortlist

Part II — Are we ready?

Readiness stages

From assessment to action

01

PART I · OPPORTUNITY

Where could AI help?

Use the questions on the following pages to look for friction, information gaps, delayed decisions, repetitive work, and opportunities for earlier visibility.

01	02	03	04	05
Repetitive Work	Information & Knowledge	Decisions	Risk & Foresight	Service & Operations

01 Repetitive Work

Look for work that consumes time because people repeatedly perform the same cognitive or administrative steps.

- [ ] Which recurring tasks consume staff time without requiring unique judgment at every step?
- [ ] Where are employees manually copying, formatting, categorizing, summarizing, or reconciling information?
- [ ] Which workflows create avoidable handoffs, duplicate entry, or administrative delay?
- [ ] Where do employees repeatedly create similar first drafts, reports, responses, or summaries?

02 Information & Knowledge

Look for situations where the answer exists, but finding it is harder than it should be.

- [ ] Where do employees spend time searching for documents, policies, prior work, answers, or subject-matter expertise?
- [ ] What important knowledge is fragmented across shared drives, databases, collaboration platforms, email, or individuals?
- [ ] Which questions are repeatedly answered by the same experts?
- [ ] Where does work slow down because employees do not know where to look, what to search, or who to ask?

- Capture answers as specific workflows and named teams, not categories. "Intake summaries in patient scheduling" is an opportunity; "documentation" is not.

03 Decisions

Look for decisions that depend on multiple variables, systems, assumptions, or competing priorities.

- [ ] Which recurring decisions require information from multiple systems or teams?
- [ ] Where do leaders struggle to compare alternatives, tradeoffs, assumptions, or scenarios?
- [ ] Which decisions would benefit from clearer evidence without transferring decision authority to a model?
- [ ] Where would faster synthesis of cost, performance, schedule, risk, readiness, or other factors improve decision-making?

04 Risk & Foresight

Look for conditions the organization currently recognizes only after performance has already changed.

- [ ] What problems are usually discovered only after a threshold is crossed or performance begins to decline?
- [ ] What would the organization benefit from knowing 30, 60, or 90 days earlier?
- [ ] Which trends, relationships, or anomalies could provide earlier warning?
- [ ] Where would earlier visibility give leaders meaningful time to investigate, adjust, or act?

TODAY		EARLIER VISIBILITY
Problem visible after the threshold is crossed	—	Time to investigate, adjust, or act

05 Service & Operations

Look for work where speed, consistency, information access, or staff capacity directly affects delivery.

- [ ] Where does response time affect customer, client, patient, employee, or mission outcomes?
- [ ] Which interactions depend on finding or synthesizing information quickly?
- [ ] Where could AI assist staff without removing necessary human accountability?
- [ ] Which operational bottlenecks are caused by information rather than physical capacity?

KEY STATEMENT

Where could AI assist staff without removing necessary human accountability?

The strongest opportunities in this section are usually bottlenecks caused by information — not by physical capacity.

BEFORE MOVING TO PART II

Collect
Every candidate raised across the five lenses.

Rate
Value, feasibility, risk, and measurability — before technology.

Shortlist
Carry only the highest-priority use cases into readiness.

WORKSHEET

Opportunity shortlist

For each candidate, rate the opportunity before discussing technology.

1 Opportunity 1

PROBLEM / WORKFLOW

PRIMARY USERS

DESIRED OUTCOME

BUSINESS VALUE
Low Med High

FEASIBILITY
Low Med High

CONSEQUENCE OF ERROR
Low Med High

HUMAN REVIEW AVAILABLE
Yes No

MEASURABLE BASELINE
Yes No

PRIORITY
Now Next Later

2 Opportunity 2

PROBLEM / WORKFLOW

PRIMARY USERS

DESIRED OUTCOME

BUSINESS VALUE
Low Med High

FEASIBILITY
Low Med High

CONSEQUENCE OF ERROR
Low Med High

HUMAN REVIEW AVAILABLE
Yes No

MEASURABLE BASELINE
Yes No

PRIORITY
Now Next Later

3 Opportunity 3

PROBLEM / WORKFLOW

PRIMARY USERS

DESIRED OUTCOME

BUSINESS VALUE
Low Med High

FEASIBILITY
Low Med High

CONSEQUENCE OF ERROR
Low Med High

HUMAN REVIEW AVAILABLE
Yes No

MEASURABLE BASELINE
Yes No

PRIORITY
Now Next Later

4 Opportunity 4

PROBLEM / WORKFLOW

PRIMARY USERS

DESIRED OUTCOME

BUSINESS VALUE
Low Med High

FEASIBILITY
Low Med High

CONSEQUENCE OF ERROR
Low Med High

HUMAN REVIEW AVAILABLE
Yes No

MEASURABLE BASELINE
Yes No

PRIORITY
Now Next Later

5 Opportunity 5

PROBLEM / WORKFLOW

PRIMARY USERS

DESIRED OUTCOME

BUSINESS VALUE
Low Med High

FEASIBILITY
Low Med High

CONSEQUENCE OF ERROR
Low Med High

HUMAN REVIEW AVAILABLE
Yes No

MEASURABLE BASELINE
Yes No

PRIORITY
Now Next Later

SORTING THE SHORTLIST

BUSINESS VALUE →

Build the foundation

High value, low feasibility — close the readiness gap first.

Pilot now

High value, high feasibility, reviewable output, measurable baseline.

Later

Low value, low feasibility — revisit after the first pilots.

Quick, but minor

Easy to do, limited impact — useful practice, not a priority.

FEASIBILITY →

02

PART II · READINESS

Are we ready?

Readiness should be evaluated against a specific use case. A company can be ready for a low-risk internal drafting workflow while being unready for an AI system that handles sensitive information or influences high-impact decisions.

01 People	02 Process	03 Data & Knowledge
04 Technology	05 Security & Privacy	06 Governance

01

People

AI needs accountable owners, capable users, and people who can recognize when an output should not be trusted.

- [ ] An executive sponsor or accountable owner is identified.
- [ ] The users understand the workflow and expected outcome.
- [ ] Qualified humans can review important outputs.
- [ ] Training needs have been identified.
- [ ] Users know when to escalate uncertainty, exceptions, or errors.

02

Process

AI works best when the process around it is understood well enough to improve.

- [ ] The current workflow is documented.
- [ ] The problem being solved is clearly defined.
- [ ] Baseline performance can be measured.
- [ ] Escalation and exception paths are clear.
- [ ] A pilot can be tested without disrupting critical operations.

03

Data & Knowledge

AI cannot compensate indefinitely for unreliable, inaccessible, or poorly governed information.

- [ ] Required information exists and is accessible.
- [ ] Sources are sufficiently current and reliable for the intended use.
- [ ] Authoritative sources can be distinguished from unofficial ones.
- [ ] Ownership and provenance are understood.
- [ ] Sensitive, regulated, confidential, or restricted information is identified.

04

Technology

A successful demonstration is not the same as a capability that can operate reliably inside the organization.

- [ ] The environment can integrate the required tools, applications, or data.
- [ ] Identity and access can be managed.
- [ ] Performance and availability requirements are understood.
- [ ] Existing systems and legacy dependencies have been considered.
- [ ] The approach can scale if the pilot succeeds.

05

Security & Privacy

The AI environment should preserve the boundaries the organization already expects around its information.

- [ ] Approved AI tools and environments are defined.
- [ ] Data-handling requirements are understood.
- [ ] User permissions and information restrictions can be enforced.
- [ ] Sensitive information can be prevented from appearing in unauthorized outputs.
- [ ] Logging, monitoring, or traceability requirements are identified.

06

Governance

Useful AI should strengthen human decision-making without making accountability ambiguous.

- [ ] Human authority is explicit.
- [ ] Acceptable use is documented.
- [ ] Important assumptions and limitations can be communicated.
- [ ] Outputs can be validated or traced where necessary.
- [ ] Ownership exists for ongoing monitoring, updates, incidents, and retirement.

WHERE THE ORGANIZATION STANDS

Readiness stages

01	**Exploring**	Opportunities are visible, but ownership, boundaries, information, or workflow foundations are not yet sufficiently defined.
02	**Preparing**	Priority use cases are emerging and the organization is actively addressing the gaps required to test them.
03	**Ready**	A bounded use case has clear ownership, usable information, appropriate controls, human review, and measurable success criteria.
04	**Scaling**	Successful use cases are being integrated into normal operations, monitored, governed, and expanded deliberately.

READINESS SNAPSHOT · CHECKS CONFIRMED PER DIMENSION

People	Process	Data	Technology	Security	Governance
__ / 5	__ / 5	__ / 5	__ / 5	__ / 5	__ / 5

WORKSHEET

From assessment to action

For each high-priority use case, identify the gap that must be closed before a pilot begins.

Priority Use Case 1

USE CASE _____

BIGGEST READINESS GAP _____

ACTION REQUIRED _____

ACCOUNTABLE OWNER _____

PILOT SUCCESS MEASURE _____ REVIEW DATE _____

Priority Use Case 2

USE CASE _____

BIGGEST READINESS GAP _____

ACTION REQUIRED _____

ACCOUNTABLE OWNER _____

PILOT SUCCESS MEASURE _____ REVIEW DATE _____

Priority Use Case 3

USE CASE _____

BIGGEST READINESS GAP _____

ACTION REQUIRED _____

ACCOUNTABLE OWNER _____

PILOT SUCCESS MEASURE _____ REVIEW DATE _____

GATE CHECK

Five questions before you pilot

If the group cannot answer all five in plain language, the use case is not ready to start.

01 What specific problem are we solving?

02 Why is AI appropriate for this problem?

03 What information will the capability rely on?

04 Where does human judgment remain in the workflow?

05 What measurable result would justify continuing or scaling?

NEXT STEP

A completed assessment should produce a prioritized opportunity list and a visible set of readiness gaps.

Those findings can become the foundation for an AI roadmap, pilot plan, governance effort, workforce training program, or technology strategy tailored to the organization.

WHERE BOULEVARDLABS WORKS

- AI roadmap
- Pilot planning
- Governance
- Workforce training
- Technology strategy