

AI and Work Readiness

A worksheet to help leadership teams prepare for AI or new technology. Review tasks, employee responsibilities, oversight and preparation for a pilot.

HOW TO USE IT Complete Parts 1 to 6 with the leaders sponsoring the rollout and the employees involved. Use the readiness check in Part 7 to identify questions that need further attention. Fill it in on screen or print it.

THE TECHNOLOGY OR TOOL

SPONSOR

PREPARED BY

DATE

PART 1

Business purpose

Describe the business need and what the technology is intended to change.

IN ONE SENTENCE, WHAT BUSINESS PROBLEM ARE WE SOLVING?

WHY IS TECHNOLOGY THE RIGHT ANSWER TO THIS PROBLEM?

How we will know it worked

Include at least one measure beyond time saved.

MEASURE	TODAY	TARGET	HOW WE WILL MEASURE IT

Map the work today

Include the steps, exceptions and workarounds used in the current process.

STEP	WHO DOES IT	HANDOFFS AND EXCEPTIONS	WORKAROUNDS	KEEP, SIMPLIFY OR STOP

WHICH PARTS OF THIS WORK CREATE THE MOST VALUE?

WHAT SHOULD STOP OR BE SIMPLIFIED BEFORE ANYTHING IS AUTOMATED?

Divide the work

Decide what the tool does, what people do and who checks the result.

TASK	THE TOOL DOES	PEOPLE DO	WHO REVIEWS THE OUTPUT

ONE PERSON ACCOUNTABLE FOR THE FINAL RESULT

WHO REVIEWS ERRORS, EXCEPTIONS AND QUESTIONABLE OUTPUT

WHEN AN EMPLOYEE SHOULD OVERRIDE OR ESCALATE THE TOOL'S RECOMMENDATION

Roles and skills

Be specific about how each role changes.

ROLE	HOW THE WORK CHANGES	NEW SKILLS NEEDED	RESPONSIBILITIES TO UPDATE

HOW MANAGERS WILL REVIEW AND EVALUATE THE NEW WORK

WHAT PEOPLE WILL DO WITH THE TIME THE TOOL IS EXPECTED TO FREE UP

Data and governance

Identify the information the tool uses and who is responsible for its oversight.

DATA THE TOOL USES	WHAT IT IS USED FOR	ACCURATE ENOUGH?	DATA OWNER
		☐	
		☐	
		☐	
		☐	

Risk review

RISK	REVIEWED?	REVIEWED BY	WHAT WE FOUND
Privacy	☐		
Security	☐		
Bias	☐		
Access	☐		

GOVERNANCE OWNER

HOW OFTEN RESULTS ARE CHECKED

HOW RESULTS WILL BE MONITORED AFTER ROLLOUT

Pilot and rollout

Plan a pilot with employees familiar with the process and define how it will be evaluated.

PILOT GROUP

PILOT START

PILOT END

EVALUATION DATE

EMPLOYEES WHO WILL HELP TEST THE PROCESS

WHAT THE PILOT NEEDS TO SHOW BEFORE A BROADER ROLLOUT

MANAGER BRIEFING DATE

BRIEFED BY

HOW PEOPLE REPORT PROBLEMS WITHOUT BEING SEEN AS RESISTING THE TOOL

Readiness check

Mark each question Yes, No or Not yet. Review the gaps and record any decisions needed before rollout.

01 Business purpose

QUESTION	YES	NO	NOT YET
Can we name the specific business problem this technology is intended to solve?	☐	☐	☐
Do we know what a successful result would look like?	☐	☐	☐
Have we identified a measure beyond general time savings?	☐	☐	☐
Do we know why technology is the appropriate answer?	☐	☐	☐

02 Current work

QUESTION	YES	NO	NOT YET
Have we mapped how the work happens today?	☐	☐	☐
Have we included handoffs, exceptions and informal workarounds?	☐	☐	☐
Do we know which parts of the process create value?	☐	☐	☐
Have we identified work that should stop or be simplified before it is automated?	☐	☐	☐

03 Human and technology responsibilities

QUESTION	YES	NO	NOT YET
Have we decided which tasks the technology will perform?	☐	☐	☐
Have we identified where human judgment is still required?	☐	☐	☐
Is one person clearly accountable for the final result?	☐	☐	☐
Do we know who will review errors, exceptions or questionable output?	☐	☐	☐
Have we defined when an employee should override or escalate the system's recommendation?	☐	☐	☐

04 Roles and skills

QUESTION	YES	NO	NOT YET
Do affected employees understand how their work will change?	☐	☐	☐
Have job responsibilities been updated where necessary?	☐	☐	☐
Do managers know how to review and evaluate the new work?	☐	☐	☐
Have we identified new skills employees or managers will need?	☐	☐	☐
Have we decided what people will do with the capacity the tool is expected to create?	☐	☐	☐

05 Data and governance

QUESTION	YES	NO	NOT YET
Do we understand what data the tool uses?	☐	☐	☐
Is that information accurate enough for the intended decision?	☐	☐	☐
Have privacy, security, bias and access risks been reviewed?	☐	☐	☐
Is there a process for monitoring results after rollout?	☐	☐	☐
Is there a named owner for governance?	☐	☐	☐

06 Implementation

QUESTION	YES	NO	NOT YET
Have the people who perform the work helped test the new process?	☐	☐	☐
Are we piloting the change before a broad rollout?	☐	☐	☐
Have managers been prepared before the announcement?	☐	☐	☐
Is there a way to report problems without discouraging use?	☐	☐	☐
Is there a scheduled date to evaluate whether the tool is improving the work?	☐	☐	☐

SUMMARY Where do we stand?

Mark each area settled or open. For each open area, record the decision, the owner and the date.

AREA	SETTLED	OPEN	DECISION, OWNER AND DATE
Business purpose	☐	☐	
Current work	☐	☐	
Human and technology responsibilities	☐	☐	
Roles and skills	☐	☐	
Data and governance	☐	☐	
Implementation	☐	☐	

A QUESTION FOR DISCUSSION

Can the employees using the tool explain their responsibilities in the new process?

Use any gaps in that explanation to identify further role clarification, training or preparation.

OUR ANSWER

READY TO ROLL OUT? ☐ Yes ☐ Pilot first ☐ Not yet

SIGNED OFF BY

DATE