

AI WISE

# Team AI Readiness Checklist

20 questions across four domains to help organizational buyers assess team readiness and identify the right training plan.

|                             |                                  |
|-----------------------------|----------------------------------|
| 01 AI Awareness & Literacy  | 02 Policy & Governance Readiness |
| 03 Role-Specific Competence | 04 Organizational Risk Exposure  |

## How to use this checklist

Work through each section and mark every statement that accurately describes your organization today — not where you intend to be. Score one point per checked item. Your total score maps to a recommended starting point at the end of this document.

*This checklist is a conversation starter, not a verdict. Every organization is at a different stage. What matters is knowing where you stand so you can make an informed decision about what comes next.*

## 01 AI Awareness & Literacy

Does your team have a working understanding of what AI is, how it functions in your industry, and what it cannot reliably do?

- Most team members can explain in plain language what AI is and how it differs from traditional software.  
*Not just awareness — can they articulate it to a colleague or a client?*
- Team members understand that AI produces probabilistic outputs, not guaranteed facts.  
*This is where most compliance and quality risks begin.*
- Staff are aware of at least two ways AI is currently being used in your industry or profession.  
*Generic awareness vs. domain-relevant understanding.*
- Your team knows the difference between AI tools that generate content and those that analyze or classify data.  
*Conflating these leads to misapplication and governance failures.*
- When AI produces an unexpected or incorrect output, team members know what to do next.  
*Escalation paths and error literacy are foundational governance behaviors.*

Section score:

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5

## 02 Policy & Governance Readiness

Does your organization have AI-related policies in place, and — critically — does your team know they exist?

- Your organization has a written policy governing acceptable use of AI tools by staff.  
*A policy that lives only in the employee handbook is not a governance policy.*
- Team members have been informed of this policy in the past 12 months — not just at onboarding.  
*AI policy requires active reinforcement, not one-time disclosure.*
- There is a clear process for staff to flag concerns or ask questions about AI use.  
*Governance without a feedback channel creates silent compliance failures.*
- Your organization tracks which AI tools are approved for use versus which are prohibited or under review.  
*Shadow AI adoption is the most common governance gap in mid-size organizations.*
- Leadership has communicated the organization's position on AI — what it supports, what it cautions against.  
*Silence from leadership is interpreted as permission.*

Section score:

\_\_\_\_ /  
5

### 03 Role-Specific Competence

Has your team received training relevant to how AI affects their specific professional role — not just generic AI awareness?

- Team members in client-facing roles understand the disclosure and transparency expectations around AI-assisted work.  
*Generic AI training does not cover this. Role-specific training does.*
- Staff in regulated functions (legal, finance, HR, compliance) have received guidance on AI use within their regulatory context.  
*The risks for a finance professional differ fundamentally from those for a project manager.*
- Team members understand what AI can appropriately assist with in their role and what requires unassisted human judgment.  
*This boundary is the most common source of professional liability exposure.*
- Your organization can verify, with documentation, that specific staff have completed AI literacy training.  
*Verifiable completion — not just attendance — is what holds up under audit.*
- Training has been updated or reviewed in the past 12 months to reflect current AI capabilities and risks.  
*AI literacy from 18 months ago is already materially incomplete.*

Section score:

     /  
5

### 04 Organizational Risk Exposure

Where are the gaps that create compliance, liability, or operational risk for your organization right now?

- Your organization has assessed which roles carry the highest AI-related risk and prioritized training accordingly.  
*Blanket training without risk prioritization misses the exposures that matter most.*
- If an AI-related incident occurred today — a compliance breach, a client complaint, a data error — you have a documented response process.  
*Incident readiness is the governance layer most organizations discover they're missing too late.*
- Your board or senior leadership has visibility into how AI is being used across the organization.  
*Board-level AI literacy is now a fiduciary expectation in many regulated sectors.*
- You are confident that staff understand the data privacy implications of the AI tools they use.  
*Data input into consumer AI tools is the most common unmanaged risk in professional settings.*
- If a regulator, auditor, or client asked for evidence of your AI governance program today, you could provide it.  
*This question separates organizations with governance from those with intentions.*

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Section score:

     /  
5

## Your Score Guide

Add your four section scores for a total out of 20. Find your range below. Use this as a starting point for the conversation — not a final verdict.

**TOTAL SCORE:**

\_\_\_\_\_ / 20

### 16 – 20 — Strong Foundation

**Recommended starting point:** Core Pilot or Team Pack

Your organization has solid AI literacy fundamentals. The priority now is role-specific depth — ensuring the right people have the right training for their professional context. A targeted plan covering your highest-risk roles will close the remaining gaps efficiently.

### 10 – 15 — Building Blocks in Place

**Recommended starting point:** Team Pack or Department Pack

Awareness exists but governance and role-specific competence have gaps. This is the most common profile for organizations that have started the AI conversation but haven't formalized it. Structured, role-specific training with documented completion will materially reduce your exposure.

### 5 – 9 — Significant Gaps Identified

**Recommended starting point:** Department Pack or Organisation

Policy, role-specific training, and risk awareness all need attention. Your organization is likely operating with informal AI use that hasn't been inventoried or governed. A structured program covering all roles — starting with your highest-risk functions — is the right next step.

### 0 – 4 — Foundational Work Required

**Recommended starting point:** Organisation or Enterprise

AI literacy and governance are at an early stage across the organization. This is not a crisis — it is an opportunity to build the right foundation before incidents force reactive action. Starting with a comprehensive program across all roles will establish the baseline your organization needs.

## Ready to close the gaps?

AI Wise offers role-specific AI literacy and governance training — built for the professionals who carry the most AI-related risk in your organization. Every course delivers a verifiable, non-expiring credential your team can stand behind.

| Plan            | Annual       | Seats     | Includes          |
|-----------------|--------------|-----------|-------------------|
| Core Pilot      | \$997 / yr   | 10 seats  | AI Wise Core only |
| Team Pack       | \$1,497 / yr | 5 seats   | All 8 role tracks |
| Department Pack | \$2,497 / yr | 10 seats  | All 8 role tracks |
| Organisation    | \$4,997 / yr | 25 seats  | All 8 role tracks |
| Enterprise      | \$9,997 / yr | Unlimited | All 8 role tracks |

### Talk to us about your team's needs.

Visit [aiwise.training/ai-wise-for-teams-and-organizations](https://aiwise.training/ai-wise-for-teams-and-organizations) or complete the Teams inquiry form. We will help you identify the right plan and get your team started.