

Beginner to Expert AI Readiness Checklist

A simple way to see where your team stands today, and what to try next.

01 Explorer

Trying prompts for writing and brainstorming, with no shared standards yet.

- ☐ At least one person on the team has used AI for a real work task, not just a demo
- ☐ You have tried AI for a first draft of an email, post, or document
- ☐ You have asked AI a question you would normally have googled
- ☐ Nobody on the team is tracking which prompts actually work well

02 Operator

Using reusable prompt patterns and knowing how to give good context.

- ☐ You reuse a prompt more than once instead of starting fresh every time
- ☐ Your prompts include real context: background, audience, tone, and goal
- ☐ You review AI output before sending or using it, not just copy and paste
- ☐ At least one teammate has picked up a pattern you built

03 Builder

Creating repeatable workflows, checklists, templates, and light automation.

- ☐ You have a small library of prompt templates the team can pull from
- ☐ At least one workflow, such as quoting or first response drafting, uses AI as a standard step
- ☐ Your key files, data, and permissions are clean enough for AI to use reliably
- ☐ You have measured time saved on at least one workflow

04 Leader

Setting standards, reviewing risk, coaching others, and measuring value.

- ☐ You have written guidance for what AI should and should not be used for
- ☐ Someone owns reviewing AI output for quality and risk
- ☐ You coach new team members on the patterns that already work
- ☐ You track value, such as time saved or quality improved, and share it with the team

What to do with this

Pick two use cases, one executive and one operational, and start at the stage that matches where you are today. Most teams can move up a level in a matter of weeks once they focus on patterns instead of one off prompts.

Want help building this out for your team? Reach out to Reach.