

AI READINESS ASSESSMENT

Customer Self-Assessment Questionnaire

BREAM IT SOLUTIONS

Evaluate whether your organization is ready to adopt artificial intelligence safely, responsibly, and in ways that produce measurable business value.

This questionnaire examines strategy, use cases, data, technology, cybersecurity, governance, workforce readiness, operational processes, and implementation risk.

Complete electronically, save the PDF, and return it to Bream for review.

1. Organization & AI Profile

Help Bream understand your business and current level of AI adoption.

Organization	Primary Contact
Title / Role	Email
Industry	Approx. Employees

How is AI currently being used? (select all that apply)

- | | |
|--|--|
| ☐ Not currently using AI | ☐ Individual employee experimentation |
| ☐ ChatGPT / generative AI | ☐ Microsoft Copilot |
| ☐ Google Gemini | ☐ AI built into SaaS applications |
| ☐ Customer-facing AI | ☐ Workflow automation / agents |
| ☐ Analytics / forecasting | ☐ Software development |
| ☐ Marketing / content | ☐ Other departmental use |

What does your organization hope AI will improve?

2. AI Strategy & Leadership

Select Yes, Partial, No, or Not Applicable. Add notes where context is important.

	YES	PART	NO	N/A
Has leadership identified clear business reasons for adopting AI?	☐	☐	☐	☐
Is there an executive or business owner accountable for AI initiatives?	☐	☐	☐	☐
Are proposed AI projects tied to measurable outcomes such as revenue, cost reduction, productivity, quality, or customer experience?	☐	☐	☐	☐
Does the organization have a process for prioritizing AI opportunities rather than adopting tools ad hoc?	☐	☐	☐	☐
Are budget, ownership, and implementation resources available for approved AI initiatives?	☐	☐	☐	☐
Has leadership discussed acceptable AI risk and where AI should or should not be used?	☐	☐	☐	☐

Notes / opportunities / known gaps:

3. AI Use Cases & Business Value

Select Yes, Partial, No, or Not Applicable. Add notes where context is important.

	YES	PART	NO	N/A
Have repetitive, manual, or information-heavy workflows been identified as possible AI opportunities?	☐	☐	☐	☐
Are AI use cases evaluated based on expected business value and implementation complexity?	☐	☐	☐	☐
Does the organization understand which tasks require human review even if AI is introduced?	☐	☐	☐	☐
Are customer-facing AI use cases evaluated separately from internal productivity use cases?	☐	☐	☐	☐
Are success metrics defined before an AI pilot or deployment begins?	☐	☐	☐	☐
Is there a process for stopping or redesigning AI initiatives that do not deliver sufficient value?	☐	☐	☐	☐

Notes / opportunities / known gaps:

4. Data Readiness & Quality

Select Yes, Partial, No, or Not Applicable. Add notes where context is important.

	YES	PART	NO	N/A
Does the organization know what data would be required for its highest-priority AI use cases?	☐	☐	☐	☐
Is important business data accurate, accessible, and sufficiently organized for AI-assisted workflows?	☐	☐	☐	☐
Are data owners identified for critical business information?	☐	☐	☐	☐
Are sensitive, confidential, regulated, or customer data types classified or otherwise understood?	☐	☐	☐	☐
Are data retention, quality, duplication, and access issues actively managed?	☐	☐	☐	☐
Can approved AI tools access needed data without exposing information to unauthorized users or services?	☐	☐	☐	☐

Notes / opportunities / known gaps:

5. Technology & Integration Readiness

Select Yes, Partial, No, or Not Applicable. Add notes where context is important.

	YES	PART	NO	N/A
Are core business applications and technology platforms documented and reasonably current?	☐	☐	☐	☐
Does the organization understand which systems offer APIs, automation, or approved AI integrations?	☐	☐	☐	☐
Are Microsoft 365, Google Workspace, CRM, ERP, line-of-business, and cloud platforms managed consistently?	☐	☐	☐	☐
Is there sufficient identity, endpoint, network, and cloud management to support controlled AI deployment?	☐	☐	☐	☐
Can AI solutions be piloted without creating uncontrolled shadow IT or duplicate systems?	☐	☐	☐	☐
Does the organization have technical resources or partners capable of integrating and supporting AI solutions?	☐	☐	☐	☐

Notes / opportunities / known gaps:

6. Cybersecurity & AI Security

Select Yes, Partial, No, or Not Applicable. Add notes where context is important.

	YES	PART	NO	N/A
Are employees prohibited from entering sensitive or regulated information into unapproved public AI tools?	☐	☐	☐	☐
Are approved AI applications reviewed for security, privacy, data retention, and access controls?	☐	☐	☐	☐
Is multi-factor authentication enforced for business applications that may connect to AI tools?	☐	☐	☐	☐
Are third-party AI integrations, plugins, agents, and application permissions reviewed before deployment?	☐	☐	☐	☐
Are logging, monitoring, and incident-response processes capable of addressing AI-related security events?	☐	☐	☐	☐
Does the organization consider risks such as data leakage, prompt injection, excessive permissions, and unsafe automated actions?	☐	☐	☐	☐

Notes / opportunities / known gaps:

7. AI Governance, Privacy & Compliance

Select Yes, Partial, No, or Not Applicable. Add notes where context is important.

	YES	PART	NO	N/A
Does the organization have an AI acceptable-use policy or equivalent written guidance?	☐	☐	☐	☐
Is there a process for approving AI tools before employees use them for business purposes?	☐	☐	☐	☐
Are regulatory, contractual, privacy, intellectual-property, and records-retention obligations considered before AI deployment?	☐	☐	☐	☐
Are AI vendors evaluated for how they store, process, retain, and use organizational data?	☐	☐	☐	☐
Are higher-risk AI uses subject to additional review, documentation, or executive approval?	☐	☐	☐	☐
Is there a process to document AI systems, owners, purposes, data sources, and key risks?	☐	☐	☐	☐

Notes / opportunities / known gaps:

8. Human Oversight & Responsible AI

Select Yes, Partial, No, or Not Applicable. Add notes where context is important.

	YES	PART	NO	N/A
Are employees instructed to verify important AI-generated information before relying on it?	☐	☐	☐	☐
Are decisions with significant legal, financial, employment, healthcare, safety, or customer impact subject to appropriate human review?	☐	☐	☐	☐
Does the organization consider potential bias, inaccurate outputs, hallucinations, and inappropriate recommendations?	☐	☐	☐	☐
Are users told when AI-generated content requires review, approval, or disclosure?	☐	☐	☐	☐
Can employees escalate concerns when an AI system produces unsafe, inaccurate, or inappropriate results?	☐	☐	☐	☐
Are accountability and final decision-making responsibilities clear when AI assists a business process?	☐	☐	☐	☐

Notes / opportunities / known gaps:

9. Workforce Skills & Change Readiness

Select Yes, Partial, No, or Not Applicable. Add notes where context is important.

	YES	PART	NO	N/A
Do employees understand basic AI capabilities, limitations, and risks?	☐	☐	☐	☐
Has the organization identified which teams or roles would benefit most from AI training?	☐	☐	☐	☐
Are employees trained on approved AI tools rather than being expected to experiment without guidance?	☐	☐	☐	☐
Are managers prepared to redesign workflows and responsibilities when AI changes how work is performed?	☐	☐	☐	☐
Is there a plan to communicate how AI adoption affects employees, customers, and business processes?	☐	☐	☐	☐
Does the organization have internal AI champions or designated resources who can support responsible adoption?	☐	☐	☐	☐

Notes / opportunities / known gaps:

10. Process & Automation Readiness

Select Yes, Partial, No, or Not Applicable. Add notes where context is important.

	YES	PART	NO	N/A
Are important business workflows documented well enough to identify automation opportunities?	☐	☐	☐	☐
Are manual handoffs, duplicate data entry, repetitive reporting, and approval bottlenecks understood?	☐	☐	☐	☐
Are processes standardized before attempting to automate them with AI?	☐	☐	☐	☐
Can automated workflows be tested in a controlled environment before full deployment?	☐	☐	☐	☐
Are exception handling, human approvals, and rollback procedures considered for automated AI workflows?	☐	☐	☐	☐
Are process owners available to validate whether AI automation actually improves operations?	☐	☐	☐	☐

Notes / opportunities / known gaps:

11. Vendor & AI Tool Management

Select Yes, Partial, No, or Not Applicable. Add notes where context is important.

	YES	PART	NO	N/A
Is there an inventory of AI tools currently used or being evaluated by employees?	☐	☐	☐	☐
Are AI vendors reviewed for security, privacy, reliability, contractual terms, and business continuity?	☐	☐	☐	☐
Does the organization understand whether vendor data may be used to train or improve external AI models?	☐	☐	☐	☐
Are AI subscriptions, licenses, integrations, and administrative owners centrally managed?	☐	☐	☐	☐
Are vendors required to notify the organization of material security, privacy, or service changes when appropriate?	☐	☐	☐	☐
Is there an exit plan for retrieving data and replacing an AI service if the vendor becomes unsuitable?	☐	☐	☐	☐

Notes / opportunities / known gaps:

12. Measurement, Monitoring & Scaling

Select Yes, Partial, No, or Not Applicable. Add notes where context is important.

	YES	PART	NO	N/A
Are AI pilots evaluated using defined business and risk metrics?	☐	☐	☐	☐
Are accuracy, quality, productivity, cost, and user adoption measured after deployment?	☐	☐	☐	☐
Are AI outputs periodically reviewed to ensure performance has not degraded?	☐	☐	☐	☐
Are incidents, errors, complaints, and exceptions tracked for deployed AI solutions?	☐	☐	☐	☐
Is there a process for moving successful pilots into supported production services?	☐	☐	☐	☐
Can the organization scale AI use while maintaining governance, security, documentation, and ownership?	☐	☐	☐	☐

Notes / opportunities / known gaps:

13. AI Priorities & Next Steps

Help Bream identify where an AI roadmap could create the most value.

Which business areas are highest priority for AI?

- ☐ Executive / strategy
- ☐ Sales
- ☐ Marketing
- ☐ Customer service
- ☐ Finance / accounting
- ☐ HR / recruiting
- ☐ IT / cybersecurity
- ☐ Operations
- ☐ Compliance / risk
- ☐ Data / reporting
- ☐ Project management
- ☐ Industry-specific workflows

Top three AI opportunities or problems you want to solve

Desired AI implementation timeframe

Additional comments:

Bream Review - What Happens Next

Turn AI interest into a governed, secure, business-focused roadmap.

Bream can review the completed questionnaire to identify readiness gaps, high-value use cases, and areas that require deeper technical or governance validation.

A formal Bream AI Readiness Assessment can help leadership determine what to pursue now, what foundations should be improved first, and how to introduce AI without creating unnecessary security, compliance, or operational risk.

Potential Bream Deliverables

- Executive AI readiness scorecard and maturity rating
- Prioritized AI use-case portfolio
- Data and technology readiness findings
- AI cybersecurity and privacy gap analysis
- AI governance and acceptable-use recommendations
- Workflow automation opportunities
- Employee AI training and adoption recommendations
- 30/60/90-day AI readiness roadmap
- Pilot recommendations with success metrics and business outcomes

Important

This questionnaire is an initial AI readiness screening. It does not certify an AI system as safe, compliant, unbiased, or suitable for a particular regulated use. Higher-risk AI initiatives may require legal, privacy, cybersecurity, compliance, and subject-matter review before deployment.