

AI Readiness Diagnostic

15 questions across foundation, governance, capability, and talent. Answer honestly for best results — a “No” response is not a failure, it is a prioritization directive. Mark each question, then see your results.

Foundation & governance — questions 1–8

1. Can users consistently locate the authoritative document within 5 minutes?
If No, foundation incomplete. Invest in DMS adoption before any AI deployment.
 2. Do you have a single governed repository for all client or matter-related documents?
If No, prioritize Phase 1. Centralization is non-negotiable as an AI prerequisite.
 3. Have you documented and enforced an AI usage policy covering public tools?
If No, address immediately; 25% allow employees to use public AI with little oversight.
 4. Have you experienced any AI-related policy violations or data incidents in the last 12 months?
If Yes, governance is a priority before capability expansion.
 5. What percentage of your AI tools are fully integrated into production workflows (not just piloted)?
If under 20%, focus on workflow embedding and integration architecture first.
 6. Do you have API standards in place for how AI tools connect to your DMS?
If No, delay multi-vendor AI deployment. Without standards, you accumulate fragmentation.
 7. Are your clients actively requesting or encouraging your AI adoption?
If No, your governance posture may be limiting client trust in your AI capabilities.
 8. Can you quantify the business impact of your AI investments — not just usage metrics?
If No, establish baseline metrics before the next investment cycle.
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9. Does your DMS support semantic search and natural language queries today?
If No, this is your most actionable near-term AI investment. NLQ is the #1 AI use case globally.
10. Have you vetted the security posture of every AI tool currently in use?
If No, conduct an immediate security audit; 36% have already suffered policy violations.
11. Do your end users have structured training on how to use AI tools effectively and safely?
If No, training is the #1 collaboration barrier (30%). AI amplifies this gap.
12. Are you tracking how client expectations influence your AI strategy?
If No, among the most mature, 74% say customers directly shape AI strategy.
13. Have you designated an owner for AI governance accountable for policy, compliance, and risk?
If No, assign ownership immediately. Governance is the critical AI differentiator.
14. Have you planned for new roles (knowledge strategists, digital ethics officers) in your roadmap?
If No, begin workforce planning now; 90%+ expect these roles within 10 years.
15. Does your board have visibility into AI governance metrics alongside financial performance?
If No, build board-level AI reporting as part of Phase 3 investment.

Phase 1 “Focus” (1–5 yes responses)

- Centralize all content into a governed DMS before deploying any AI tooling.
- Assign a named AI governance owner and document your usage policy this quarter.
- Conduct a shadow AI inventory before the next investment decision.

Phase 2 “Ready” (6–9 yes responses)

- Your foundation is forming. Prioritize NLQ deployment within your governed DMS.
- Select 2–3 high-impact AI workflows for structured, measurable pilots.
- Establish your API integration standard before acquiring additional AI tools.

Phase 3 “Transition” (10–13 yes responses)

- Move your best-performing pilots into production as default workflow capabilities.
- Deploy at least one client-facing AI tool and begin reporting AI ROI in business outcome terms.
- Activate a governance dashboard with board-level visibility.

Phase 4 “Advance” (14–15 yes responses)

- You have the foundation to pursue proprietary AI capabilities grounded in your unique knowledge corpus.
- Begin workforce planning for trust architects, digital ethics officers, and knowledge strategists.
- Position your governance maturity as a trust-as-a-service differentiator with clients.