



SAFERPROS

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FREE BUSINESS RESOURCE

AI Readiness and Risk Checklist

A leadership control for responsible adoption

Practical guidance for business owners and leaders

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AI readiness scorecard

Rate each item 0 = not in place, 1 = partly in place, or 2 = consistently in place. A low score does not mean “do nothing.” It means begin with a smaller pilot and stronger controls.

Area	Readiness question	Score 0-2
Purpose	We can name the business problem, owner and intended user.	
Data	We know what information may and may not enter the tool.	
Accuracy	A qualified person can verify important facts before use.	
Security	Access, accounts and approved tools are controlled.	
Customer trust	We will not mislead people about claims, reviews or identity.	
Fairness	We test for unfair or inappropriate treatment.	
Operations	There is a fallback when the tool is unavailable or wrong.	
Measurement	We have a baseline and success metric.	
Training	Users understand the instructions and escalation rules.	
Governance	A leader reviews incidents and approves expansion.	

Interpretation

- 0-7: prepare policies and choose a very low-consequence experiment.
- 8-14: run a controlled pilot with documented review.
- 15-20: expand gradually, keep monitoring and retest when tools or workflows change.

Minimum safe-use policy

- Use only approved tools and accounts.
- Do not enter passwords, payment data, government identifiers, background reports, protected health information, customer secrets or employee records unless specifically authorized and protected.
- Label AI-produced drafts internally until a person approves them.
- Verify facts, calculations, citations, prices, availability and claims.
- Escalate legal, safety, licensing, employment, financial, medical and emotionally sensitive matters.
- Record material errors or complaints and improve the workflow before continuing.



Pilot approval sheet

Field	Decision
Workflow and business problem	
Owner and reviewers	
Approved information	
Prohibited information	
Required review steps	
Success metric and baseline	
Pilot dates and sample size	
Stop conditions	
Final decision: adopt, revise or stop	



Sources and responsible-use note

This publication is educational and does not replace legal, tax, cybersecurity, employment, licensing or other professional advice. AI outputs may be incomplete, inaccurate or inappropriate. Keep a qualified person responsible for review and decisions.

U.S. Small Business Administration - Market research and competitive analysis

[Open official source](#)

National Institute of Standards and Technology - AI Risk Management Framework and Generative AI Profile

[Open official source](#)

Federal Trade Commission - Advertising and marketing guidance

[Open official source](#)

U.S. Census Bureau - Business Trends and Outlook Survey

[Open official source](#)

Federal Reserve Banks - Small Business Credit Survey

[Open official source](#)

Research date: September 2026. Review time-sensitive claims and rules before relying on them.



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Free education is only the beginning. Safer Pros Networking helps business owners build purposeful connections, trusted relationships and a stronger professional community. Safer Pros Academy provides deeper business education for individuals, leaders and companies.

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Visit a local group	Experience the meeting before applying.	Visit a Group
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Develop a new group	Bring Safer Pros Networking to your market.	Start a Group
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