



REDACTED SAMPLE · AI READINESS REPORT
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AI Readiness Report

A redacted sample of the board-ready report Simon delivers within 48 hours of an SME AI Readiness Audit. Names, figures and identifying detail have been removed. Structure, scoring and recommendations are exactly as a real client receives.

PREPARED FOR

[REDACTED]

REPORT DATE

[REDACTED]

PREPARED BY

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METHODOLOGY VERSION

AI-Si Readiness Framework v2.1

UK SME · 120 staff

Professional Services

Board-Ready

What's inside this sample

- Executive summary (board-ready) with the headline AI Readiness Index.
- Five-dimension scorecard: Strategy, Data, Governance, Technology, Workforce.
- Gap analysis against the AI-ready benchmark for an SME of this size.
- 30 / 90 / 180-day prioritised roadmap with owners and dependencies.
- Governance requirements checklist mapped to UK GDPR and ICO guidance.
- ROI projections for the top three AI use cases (illustrative figures).
- Recommended next-step engagement and assumptions log.

About this redaction

Client name, sector specifics, internal system names, named individuals and commercially sensitive figures have been removed or replaced with [REDACTED] blocks. Real reports are delivered under NDA in editable format with full detail intact.

1. Executive summary

Board-ready · two-page version included in real report



[REDACTED CLIENT] is a 120-person UK professional services firm operating across three regional offices. The board commissioned an AI Readiness Audit ahead of a planned twelve-month programme of investment in client-facing automation and internal productivity tooling.

Across the five readiness dimensions the organisation scored an overall AI Readiness Index of 2.8 out of 5 — a Developing maturity profile. The headline conclusion is that the firm is close to ready, but two prerequisite gaps in governance and data infrastructure should be closed before any client-facing AI deployment.

AI Readiness Index

2.8
of 5.0

Developing — Early Stage

Some awareness and activity but inconsistent and undocumented. Formalise existing practices and establish ownership before any client-facing deployment.

Headline findings

- Strong executive sponsorship and a clearly articulated commercial rationale. Two named board members already lead AI conversations internally.
- No documented AI use policy, acceptable use guidance, or DPIA template in place. This is the highest-priority gap and a prerequisite for any deployment.
- Client matter data is well structured but currently flows into a public LLM via a SaaS plug-in approved by IT but not reviewed against UK GDPR.
- Three high-value automation opportunities identified with combined modelled saving of [REDACTED] over twelve months at gross margin.
- Workforce literacy is mixed: senior fee-earners are sceptical, mid-level staff already use unapproved tools daily. Shadow AI is the dominant risk.

Recommendation in one line

Close the governance and data prerequisites in the next 30 days, then run a single low-risk internal pilot before scaling to the two client-facing use cases identified in this report.

2. Five-dimension scorecard

Each dimension scored 1–5 against the AI-ready benchmark



The combined profile drives the overall AI Readiness Index. A high score on technology will not compensate for a low score on governance — every dimension below 3.0 is treated as a prerequisite gap.

DIMENSION	SCORE	BENCHMARK	BAR	STATUS
Strategic Alignment	3.4	3.5		On track
Data Infrastructure	2.6	3.0		Gap
Governance & Compliance	2.0	3.0		Critical gap
Technology & Infrastructure	3.2	3.0		Met
Workforce & Culture	2.8	3.0		Marginal

Why governance scored 2.0

No board-approved AI use policy. No DPIA template. No mapped position against EU AI Act categories despite cross-border client work. ICO guidance has not been formally reviewed against current AI-touching workflows. Audit trails for AI-assisted client work are not consistently captured.

Risk: any client complaint or regulator query about AI use today would surface a documentation gap that would be difficult to defend. This is fixable in 30 days.

3. Roadmap: 30 / 90 / 180 days

Prioritised actions with owners and dependencies



FIRST 30 DAYS

Close prerequisite gaps

- Adopt AI-Si AI Use Policy template, tailor to firm and ratify at next board.
- Approve DPIA template; run DPIAs on the two SaaS AI tools currently in use.
- Disable the public-LLM SaaS plug-in until DPIA review is signed off.
- Appoint an internal AI lead (named in real report) with delegated authority.

DAYS 30–90

Run one low-risk internal pilot

- Deploy approved meeting-notes summariser to one practice group; measure time saved.
- Roll out 90-minute AI literacy session to all fee-earners and support staff.
- Publish AI Steering Committee terms of reference; first meeting end of month two.
- Vendor due-diligence checklist applied to the next two AI procurement decisions.

DAYS 90–180

Scale to client-facing use cases

- Pilot the document-review automation for a single matter type with human-in-loop.
- Pilot the client-intake triage assistant on inbound enquiries from one channel.
- Re-run readiness audit on the two pilot deployments; publish lessons learned.
- Decide go / no-go on year-two scaling investment with updated ROI evidence.

4. ROI projections & governance

Top three use cases, illustrative figures redacted



USE CASE	YEAR-1 SAVING	PAYBACK	RISK
Meeting-notes summariser (internal)	[REDACTED]	[REDACTED]	Low
Document-review automation (client work)	[REDACTED]	[REDACTED]	Medium
Client-intake triage assistant	[REDACTED]	[REDACTED]	Medium

Real reports include modelled gross saving, capital and revenue cost, payback in months and net three-year contribution, with assumptions documented so finance can stress-test them.

Governance requirements (extract)

- AI Use Policy and Acceptable Use Guidelines — drafted, awaiting board ratification.
- DPIA template applied to all current and future AI-touching workflows.
- Vendor due-diligence checklist mandatory before any new AI tool procurement.
- Human-in-the-loop step documented for every AI output reaching a client.
- AI Steering Committee meeting monthly with documented decision log.
- Annual bias and fairness review for any AI use affecting client outcomes.

Want a real one for your organisation?

An AI Readiness Audit is delivered in 48 hours for SMEs. You receive a written report in this format, a debrief call with Simon, and 30 days of follow-up Q&A access.

[Book a 30-min strategy call !](#)

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