

This assessment takes approximately 10 minutes. Answer each question honestly based on your team's **current state** — not where you'd like to be. Tally your scores at the end to identify your maturity level and the highest-impact actions for the next 90 days.

Section A — Workflow Identification

For each statement, tick the box that best describes your team.

A1. How does your team currently identify which workflows to apply AI to?

☐	1	We don't — individuals choose their own tools and use cases independently.
☐	2	We've had conversations about it but haven't formalised a process.
☐	3	We've done at least one structured workflow audit to identify AI candidates.
☐	4	We use a scoring or prioritisation method to evaluate AI opportunities consistently.
☐	5	AI opportunity evaluation is an ongoing, documented practice reviewed quarterly.

A2. Which of the following best describes your team's AI tool usage today?

☐	1	Individuals use whatever tools they prefer — there's no shared set.
☐	2	A few tools have been approved but usage is inconsistent across the team.
☐	3	There's a defined set of approved tools for at least one workflow.
☐	4	Multiple workflows have approved tools with documented usage guidelines.
☐	5	Tool selection is governed: new tools go through a review process before adoption.

Section B — Pilots and Documentation

For each statement, tick the box that best describes your team.

B1. Has your team run a structured AI pilot on a specific workflow?

☐	1	No — AI usage has been exploratory and individual.
☐	2	We've tested AI informally but without defined success metrics.
☐	3	Yes — at least one pilot with defined participants, time box, and success metrics.
☐	4	We've run multiple pilots across different workflows and functions.
☐	5	Piloting is our standard process before any new AI workflow goes team-wide.

B2. How is AI usage documented on your team?

■	1	It isn't — effective approaches stay in individuals' heads.
■	2	Some notes exist but there's no consistent format or shared location.
■	3	We have a basic playbook for at least one workflow with prompt templates.
■	4	Multiple workflows have documented playbooks stored in a shared location.
■	5	Playbooks are version-controlled, assigned an owner, and reviewed quarterly.

B3. When a new team member joins, how quickly can they use AI effectively?

■	1	They start from scratch — no documentation to reference.
■	2	They rely on asking colleagues — knowledge transfer is informal.
■	3	There's some documentation but it's incomplete or hard to find.
■	4	We have a playbook that significantly accelerates their ramp-up.
■	5	Playbooks are part of onboarding — new hires are productive within their first week.

Section C — Governance and Measurement

For each statement, tick the box that best describes your team.

C1. What data governance rules are in place for AI tool usage?

■	1	None — team members decide individually what data to put into AI tools.
■	2	Informal norms exist but nothing is written down or enforced.
■	3	Basic ground rules are documented: what data can/can't go into external tools.
■	4	A formal AI use policy covers data handling, output review, and approved tools.
■	5	Policy is reviewed quarterly, communicated actively, and includes an advisory function.

C2. How does your team measure whether AI is delivering value?

■	1	We don't — it's assumed to be useful but we haven't measured it.
■	2	We track activity (tools used, prompts written) but not outcomes.
■	3	We've measured time saved for at least one workflow before and after a pilot.
■	4	We track outcome metrics (time saved, quality scores, error rates) across workflows.
■	5	We have a measurement dashboard reviewed monthly; low-value workflows are retired.

C3. How are employee concerns about AI — including job security fears — addressed?

■	1	They aren't addressed directly — we assume employees will adapt.
■	2	Leadership has communicated that AI won't affect jobs, but without specifics.
■	3	We've had open team conversations about what AI will and won't change.
■	4	We actively demonstrate how AI removes tedious work, not high-value tasks.
■	5	Employee feedback shapes which workflows we automate; concerns drive the roadmap.

Scoring — Tally Your Results

Section	Questions	Max pts	Your score
A — Workflow Identification	2	10	____ / 10
B — Pilots & Documentation	3	15	____ / 15
C — Governance & Measurement	3	15	____ / 15
TOTAL	8	40	____ / 40

What Your Score Means

Level 1 — Experimenting

1–8 pts

AI usage is individual and ad hoc. No shared workflows, policies, or metrics. Outcomes vary widely depending on who's experimenting.

90-day action: Run a workflow audit. Identify the three tasks consuming the most team time. Score them using the AI Opportunity Scorecard. Pick one to pilot.

Level 2 — Piloting

9–16 pts

At least one structured pilot has run. Early documentation exists. Basic governance ground rules are in place for that workflow.

90-day action: Complete your playbook for the piloted workflow. Run a second pilot on your next-highest-scoring candidate. Begin tracking outcome metrics.

Level 3 — Standardising

17–24 pts

Playbooks exist and are being rolled out. AI champions support adoption. Outcome metrics are tracked for at least one workflow.

90-day action: Expand playbooks to cover your top three workflows. Train by role, not one-size-fits-all. Schedule monthly measurement reviews.

Level 4 — Scaling

25–32 pts

Multiple workflows operate from playbooks. Governance infrastructure exists. AI is integrated into how the team routinely works.

90-day action: Formalise your AI advisory function. Build a measurement dashboard. Identify the next five workflow candidates for piloting.

Level 5 — Optimising

33–40 pts

The team continuously refines workflows based on performance data. AI adoption is embedded in operational strategy.

90-day action: Retire or redesign low-performing workflows. Share playbooks cross-functionally. Evaluate AI for higher-complexity tasks using a governance review.



Part of the RightClick.ai AI Adoption Starter Pack. Pair with the AI Opportunity Scorecard to identify your highest-value pilot candidates. © RightClick.ai. All rights reserved.