

— THE AI READINESS KIT

Find out what your AI is *actually touching*.

Five steps to see every AI tool in your organization, every connection, the data flowing through each one, and the first fix to make. Thirty minutes, alone or as a team. Include the tools you're not sure about. *Especially those.*

INSIDE

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| 01 | Sort your data | Three levels. The rules everything else hangs on. |
| 02 | Inventory your tools | Approved, unofficial, and the shadow AI. |
| 03 | Sweep the AI you never chose | Vendor AI inside tools you already pay for. |
| 04 | Map your connections | What your agents and automations can reach. |
| 05 | Score your readiness | Ten questions, three bands, your first week of fixes. |

PREPARED BY

DATE



— STEP 1 OF 5

Sort your data into three levels.

Every rule you will ever write about AI comes back to one question: *which data is this?* Decide the three levels once, in plain language, and the rest of this kit takes minutes.

● GREEN

Safe in any approved tool.

Public information, published marketing, industry research, general drafting and brainstorming.

● YELLOW

Only in tools that don't train on your inputs.

Internal docs, SOPs, project plans, source code, unreleased work. Business accounts, never free tiers.

● RED

Only in tools vetted and approved for this tier.

Client data, contracts, personal information, employee records, financial data, anything under NDA.

- *Not sure which level something is? Treat it as one level higher until someone decides. Then write the decision down where everyone can see it.*

— QUICK SORT • WHERE WOULD THESE LAND FOR YOU?

● A blog draft

● Your pricing sheet

● A client contract

● Competitor research

● An internal SOP

● Notes naming a client

— STEP 2 OF 5

[illegible]

- **How to check "trains on inputs":** open the tool's settings and look for "data controls" or "improve the model for everyone." Business plans usually don't train on your data. Free plans often do. When in doubt, mark yes.

3

— STEP 3 OF 5

Sweep the AI you never chose.

Some AI arrives in product updates to tools you already pay for. Finance, HR, and CRM systems now ship with AI features on by default, and they sit on the most sensitive data you hold. In most inventories, *this is the step that surprises people.*

YOUR SYSTEM	AI FEATURE PRESENT?	ON BY DEFAULT?	CAN IT BE TURNED OFF?	WHAT DATA DOES IT SEE?	ACTION
Finance / accounting	☐ Y ☐ N	☐ Y ☐ N	☐ Y ☐ N		
HR and payroll	☐ Y ☐ N	☐ Y ☐ N	☐ Y ☐ N		
CRM	☐ Y ☐ N	☐ Y ☐ N	☐ Y ☐ N		
Help desk	☐ Y ☐ N	☐ Y ☐ N	☐ Y ☐ N		
Email and docs suite	☐ Y ☐ N	☐ Y ☐ N	☐ Y ☐ N		
Meeting recorder	☐ Y ☐ N	☐ Y ☐ N	☐ Y ☐ N		
Project management	☐ Y ☐ N	☐ Y ☐ N	☐ Y ☐ N		

■ *You can't approve or decline what you haven't listed. If the answer to "can it be turned off?" is no, your data rules need to account for it, and your vendor reviews need to ask about it.*

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STEP 4 OF 5

Map your connections.

The riskiest AI is rarely a chat window. It's the assistant, agent, or automation connected to your systems, reading and writing while nobody watches. For each one, write down what it can reach next to what it actually needs.

AGENT OR AUTOMATION	CONNECTED SYSTEMS	ACCESS IT HAS	ACCESS IT NEEDS	WHO APPROVED IT?	REVIEW DATE
Daily briefing agent EXAMPLE	Chat, CRM, files	Everything connected	Read: calendar, tasks	No one yet	Fix first

" The gap between *access it has* and *access it needs* is your exposure. Close that gap before you add another connection, and put a review date on everything that stays.



— STEP 5 OF 5

Score your readiness.

YOUR SCORE

/ 10

Ten statements. Tick the ones that are true *today*, not the ones that will be true after the next meeting. Count your ticks and read your band below.

- ☐ We keep a written list of approved AI tools, and everyone can find it.
- ☐ Everyone knows which data can go into which tool.
- ☐ Company AI work happens on company accounts, not personal ones.
- ☐ We know every system where vendor AI is on by default.
- ☐ Every AI connection to company data has a named owner.
- ☐ A new tool can get a clear yes or no within days, not months.
- ☐ We can give a client one consistent sentence on how we use AI.
- ☐ A person reviews any AI-assisted decision that affects people, like hiring or pay.
- ☐ People know where to raise an AI concern, and it isn't one person's DMs.
- ☐ Someone owns AI governance as part of their actual job.

8–10

Strong foundation.

Tighten what's left and put a review date on all of it.

4–7

Typical, and fixable.

Take your lowest scores to the first-week list on the next page.

0–3

Start today.

Begin with Step 2. Visibility comes before policy.

— AFTER THE KIT

Your first week of fixes.

None of this needs a committee. Five moves, one week, in this order.

- 01 **Publish the approved list, v1.**
Even if it's three tools. A short real list beats a perfect imagined one.
- 02 **Write the three data levels where everyone can see them.**
One page, plain language, decided once.
- 03 **Move company work off personal accounts.**
Start with whoever touches red data.
- 04 **Draft your one-sentence disclosure answer.**
The next client who asks shouldn't get two different answers.
- 05 **Name one owner for tool approvals.**
Requests go to a role with a deadline, not a group chat.

DONE IN FIVE MINUTES A TOOL. OR DONE FOR YOU.

The AI Readiness *Assessment*.

cirface

We inventory every tool, connection, and data flow across your company, score people readiness alongside the tooling, and hand you risk-ranked findings with quick wins your team can apply the same week. Fixed fee, two to three weeks, and it credits toward the Governance Program.

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FIXED FEE · 2-3 WEEKS · CREDITS TOWARD GOVERNANCE