
THE AI READINESS TOOLKIT

A practical companion to the PureBrain AI Readiness Assessment. How to strengthen each of the ten areas you scored, the kinds of tools that fit each stage, and the AI Partnership Blueprint.

HOW TO USE THIS GUIDE

This guide is not meant to be read cover to cover. It is meant to be used. Find your score, find your lowest-rated areas, and start there.

- 1 **Find your total score and tier.** The assessment scores ten statements from 1 to 5, for a total between 10 and 50. Your total places you in one of four tiers. Read your tier on the next page to see what that stage usually looks like and what the next move is.
- 2 **Find your two lowest-rated areas.** Look at your score breakdown. Any area you rated 1 or 2 is where effort will pay off first. If several are tied, start with the one that blocks the others. Data Readiness and Process Documentation often come first, because much else depends on them.
- 3 **Go to those sections and run the 30-day plan.** Each of the ten areas has its own page section: why it matters, signs you are weak there, a 30-day and 90-day plan, and a checklist.
- 4 **Check the tools for your tier.** Use the tools section to choose what to try next. Pick fewer tools, not more.
- 5 **Retake the assessment in 90 days.** Your score is a snapshot, not a verdict. Retake it after a quarter of focused work and compare the breakdown.

The ten areas the assessment measures

#	AREA	THE STATEMENT YOU RATED
1	AI Tool Usage	My team uses AI tools regularly as part of our existing workflow - not just for occasional experiments.
2	Data Readiness	Our business data is organized, accessible, and clean enough that an AI could actually learn from it.
3	Team AI Literacy	Our team understands AI well enough to know what to ask it for - and what not to trust it with.
4	Process Documentation	Our core business processes are documented well enough that someone new - or an AI - could follow them.
5	Leadership Commitment	Leadership at our company is genuinely committed to AI adoption - not just saying the right things at all-hands.
6	Budget Allocation	We have a dedicated budget for AI tools and experimentation - not just a line item that gets cut when things get tight.
7	Integration Readiness	Our existing software stack could realistically integrate with AI tools - our tools have APIs or webhook support.

8	Change Management	When we adopt new technology, the team actually uses it - we have a track record of successful change management.
9	Success Metrics	We have clear metrics for what "AI success" would look like for us - time saved, revenue generated, cost reduced.
10	Partnership Mindset	We think of AI as a long-term partner to build with - not a tool to buy, use once, and replace when the next shiny thing comes along.

YOUR TIER EXPLAINED

Each tier describes a stage, not a grade. Most organizations move through all four. The goal is to know where you are so you can take the right next step instead of the most exciting one.

10 - 20

AI Tourist

You're dabbling - not deploying.

What it looks like: Someone has tried a chatbot. A few people use AI now and then. Nothing is part of how work actually gets done, and results feel hit or miss. The gap is foundation, not capability.

Your next move: Prove value in one place. Pick one repetitive weekly task, use one tool for it, and document one process. Resist buying more tools until one of them sticks.

Start with: AI Tool Usage, Process Documentation, Team AI Literacy.

21 - 30

AI Experimenter

You've started - but the cracks are showing.

What it looks like: AI is in the stack and people are using it, but there is no system. Results depend on who is prompting. Good ideas live in one person's chat history and never spread.

Your next move: Turn experiments into structure. Build a shared library of what works, standardize prompts for your most common tasks, clean up the data AI depends on, and pick one metric to track.

Start with: Data Readiness, Success Metrics, Change Management.

31 - 40

AI Ready

You have the foundation. Now build the relationship.

What it looks like: Data is reasonably clean, the team understands AI, leadership is behind it, and key processes are written down. You are getting real value, but through a collection of separate tools that each need the same context explained again.

Your next move: Reduce context-switching. Identify your highest-value bottleneck, connect your systems, and invest in AI that keeps context and learns from use rather than starting fresh every time.

Start with: Integration Readiness, Partnership Mindset, Budget Allocation.

41 - 50

AI Partner Material

You're not looking for a tool. You want a real partner.

What it looks like: Your team is fluent, results are measured, and leadership sees AI as strategic. You think in systems and compounding returns. Generic subscriptions now feel limiting because they do not know your business.

Your next move: Set measurement baselines before you change anything, map your most complex multi-step workflows, and build a working relationship with one AI partner that carries your business context.

Start with: Success Metrics, Partnership Mindset, and the AI Partnership Blueprint at the end of this guide.

THE TEN AREAS, ONE BY ONE

Go straight to the areas you rated lowest. Each plan is built to be started this week with the people and tools you already have.

01 AI TOOL USAGE

"My team uses AI tools regularly as part of our existing workflow – not just for occasional experiments."

Why it matters. AI gets more useful through repetition inside real work. Occasional experiments teach very little, because nobody builds the habit or learns where the tool is strong and where it is not.

SIGNS YOU ARE WEAK HERE

- AI gets used when someone remembers, not as a default step.
- Usage lives with one or two enthusiasts.
- Nobody can name a weekly task that AI reliably handles.

FIRST 30 DAYS

- Pick one recurring weekly task: meeting notes, first-draft emails, or research summaries.
- Use one tool for it, every time, for four weeks.
- Name one owner who reports back on what worked.

BY 90 DAYS

- Expand to three recurring tasks.
- Write each into the team's standard way of working.
- Review monthly: keep what stuck, drop what did not.

CHECKLIST

- ☐ One task chosen
- ☐ One tool chosen

- ☐ Owner named
- ☐ Four weeks of daily or weekly use

02 DATA READINESS

"Our business data is organized, accessible, and clean enough that an AI could actually learn from it."

Why it matters. AI output depends heavily on the context it is given. When outputs feel generic or off-target, the cause is often missing or messy information, not the AI itself.

SIGNS YOU ARE WEAK HERE

- Customer information is split across inboxes, spreadsheets, and people's heads.
- Duplicate or conflicting records, and no one is sure which version is current.
- No written description of what the business does, for whom, and how.

FIRST 30 DAYS

- Pick one data set that matters most (usually clients or the CRM). Remove duplicates and agree on standard fields.
- Write a one-to-two page "about our business" document: offers, customers, voice, common questions.
- Decide what information must never be pasted into an AI tool.

BY 90 DAYS

- Name a single source of truth for clients, offers, and key documents.
- Set naming and folder conventions and assign an owner for each data set.
- Review access permissions so the right people, and tools, see the right things.

CHECKLIST

- | | |
|---|--|
| ☐ Priority data set cleaned | ☐ "Never share" list agreed |
| ☐ Business context doc written | ☐ Owners assigned |

03 TEAM AI LITERACY

"Our team understands AI well enough to know what to ask it for - and what not to trust it with."

Why it matters. Literacy cuts both ways. A team that avoids AI leaves value on the table. A team that trusts it blindly creates risk. The goal is judgment: knowing when to use it, how to ask, and when to check.

SIGNS YOU ARE WEAK HERE

- People either avoid AI or accept its output without review.
- Sensitive information gets pasted in without a second thought.
- Nobody shares what they have learned.

FIRST 30 DAYS

- Run a one-hour, hands-on session using the team's real tasks, not demos.
- Teach one rule: AI drafts, a person verifies facts, numbers, and names.
- Share a short do and don't list, including data handling.

BY 90 DAYS

- Name one or two AI champions people can ask.
- Hold a monthly 20-minute show-and-tell of what worked.
- Turn the do and don't list into written usage guidelines.

CHECKLIST

- ☐ Hands-on session held
- ☐ Verify rule shared

- ☐ Champions named
- ☐ Guidelines written

04 PROCESS DOCUMENTATION

"Our core business processes are documented well enough that someone new - or an AI - could follow them."

Why it matters. If a new hire cannot follow a process from what is written down, neither can an AI. Documentation is also where you discover which steps are repetitive enough for AI to help with.

SIGNS YOU ARE WEAK HERE

- The answer to "how do we do this?" is "ask a particular person."
- New people learn by shadowing, and everyone does it a little differently.
- Work stalls when one person is out.

FIRST 30 DAYS

- Spend 30 minutes documenting one process: each step, its inputs, outputs, and decisions.
- Mark the steps that are repetitive, rules-based, or mostly writing. Those are AI candidates.
- Have someone else follow it and fix what was unclear.

BY 90 DAYS

- Document your five most important processes in one shared place.
- Use a simple, consistent template for each.
- Schedule a quarterly review so documents stay current.

CHECKLIST

- | | |
|--|---|
| ☐ One process written | ☐ Tested by someone else |
| ☐ AI-candidate steps marked | ☐ Top five documented |

05 LEADERSHIP COMMITMENT

"Leadership at our company is genuinely committed to AI adoption – not just saying the right things at all-hands."

Why it matters. Teams follow what leaders do, not what they announce. Commitment shows up as time, budget, ownership, and leaders using AI in their own work.

SIGNS YOU ARE WEAK HERE

- AI is mentioned in meetings but never given time or budget.
- Leaders do not use AI themselves.
- No one owns AI adoption.

FIRST 30 DAYS

- Each leader uses AI on their own work every week and shares one example.
- Name one owner for AI adoption.
- Write down one or two goals AI should help with this quarter.

BY 90 DAYS

- Put AI progress on the leadership agenda monthly.
- Protect regular time for the team to learn and experiment.
- Recognize learning, including experiments that did not work.

CHECKLIST

- ☐ Leaders using AI weekly
- ☐ Owner named

- ☐ Goals written
- ☐ Monthly agenda slot

06 BUDGET ALLOCATION

"We have a dedicated budget for AI tools and experimentation – not just a line item that gets cut when things get tight."

Why it matters. Without a protected budget, AI becomes a series of short trials that end before they show results. Budget also forces a useful question: what are we actually paying for, and is it used?

SIGNS YOU ARE WEAK HERE

- AI tools are expensed on personal cards with no central view.
- Several overlapping subscriptions, few used consistently.
- AI spend is the first thing cut.

FIRST 30 DAYS

- List every AI tool and subscription currently paid for.
- Cancel what is unused and consolidate overlaps.
- Redirect the savings to one tool you will commit to.

BY 90 DAYS

- Set a protected line that covers tools, training, and team time.
- Tie spend to the metric you choose in Success Metrics.
- Review quarterly: keep, expand, or stop.

CHECKLIST

- ☐ Spend inventory done
- ☐ Unused tools cancelled

- ☐ Protected line set
- ☐ Quarterly review booked

07 INTEGRATION READINESS

"Our existing software stack could realistically integrate with AI tools – our tools have APIs or webhook support."

Why it matters. AI that cannot reach your systems depends on people copying and pasting. Connected tools let information flow where it is needed and let AI act on current data.

SIGNS YOU ARE WEAK HERE

- Spreadsheets serve as the main system for key work.
- People move the same information between apps by hand.
- Core tools have no API, webhooks, or integrations.

FIRST 30 DAYS

- List your core systems and check whether each offers an API, webhooks, or ready-made integrations.
- Find one manual handoff that happens every week.
- Test automating it with an integration platform.

BY 90 DAYS

- Automate one or two more handoffs.
- At each renewal, ask whether a dead-end tool should be replaced.
- Keep a simple map of integrations and who owns each.

CHECKLIST

- | | |
|--|--|
| ☐ Systems listed | ☐ One handoff automated |
| ☐ Integration options checked | ☐ Integration map kept |

08 CHANGE MANAGEMENT

"When we adopt new technology, the team actually uses it – we have a track record of successful change management."

Why it matters. A tool nobody uses has no value, however capable it is. How you introduce AI matters as much as which AI you choose.

SIGNS YOU ARE WEAK HERE

- Past tools were bought, announced, and quietly abandoned.
- People were not asked what they needed before a rollout.
- The old way of working is never retired, so the new way never wins.

FIRST 30 DAYS

- Look back at the last tool that did not stick and write down why.
- For your next AI rollout, involve the people who will use it from day one.
- Define what "adopted" means in observable terms.

BY 90 DAYS

- Use a simple rollout playbook: small pilot group, short training, feedback loop.
- Hold a 30-day check-in after every rollout.
- Retire the old way once the new one works.

CHECKLIST

- | | |
|--|---|
| ☐ Past failure reviewed | ☐ "Adopted" defined |
| ☐ Users involved early | ☐ 30-day check-in held |

09 SUCCESS METRICS

"We have clear metrics for what "AI success" would look like for us – time saved, revenue generated, cost reduced."

Why it matters. Without a measure, every AI decision becomes opinion. A simple metric tells you where to invest next and when to stop.

SIGNS YOU ARE WEAK HERE

- The goal is "be more efficient," with nothing more specific.
- No baseline exists, so there is nothing to compare against.
- Success is judged by how impressive a demo looked.

FIRST 30 DAYS

- Pick one metric: hours saved per week, response time, or leads qualified.
- Measure the baseline before you change anything.
- Track it for 30 days.

BY 90 DAYS

- Grow to two or three metrics tied to business outcomes.
- Review them monthly with leadership.
- Use them to decide what to keep, expand, or stop.

CHECKLIST

- | | |
|--|---|
| ☐ Metric chosen | ☐ 30 days tracked |
| ☐ Baseline recorded | ☐ Monthly review set |

10 PARTNERSHIP MINDSET

"We think of AI as a long-term partner to build with – not a tool to buy, use once, and replace when the next shiny thing comes along."

Why it matters. The value of AI grows with context. Each time you switch tools, you start from zero. A partner mindset means choosing to build shared context over time, while people stay in charge of judgment and decisions.

SIGNS YOU ARE WEAK HERE

- The team switches tools whenever something new is announced.
- You re-explain your business at the start of every session.
- AI is judged on single outputs, not on how it improves over time.

FIRST 30 DAYS

- Commit to one AI for 30 days of real work.
- Give it your "about our business" document from Data Readiness.
- Keep a running note of corrections and preferences you teach it.

BY 90 DAYS

- Judge it on improvement over time, not first impressions.
- Decide which work it partners on and which stays fully human.
- Make sure a named person stays accountable for every outcome.

CHECKLIST

- | | |
|--|--|
| ☐ One AI committed to | ☐ Corrections tracked |
| ☐ Business context shared | ☐ Human owner per outcome |

TOOLS BY MATURITY TIER

Choose by category first, then by product. The examples below are well-known products in each category, listed alphabetically. They are examples, not endorsements or rankings.

Features and terms change, so check each vendor's current details before you commit.

AI Tourist 10 - 20

Goal: one tool, one task, real habit.

- **General AI assistants** for drafting, summarizing, and research. Examples: ChatGPT, Claude, Gemini, Microsoft Copilot. Pick one.
- **Meeting notes and transcription.** Examples: Fireflies.ai, Otter.ai, or the AI notes features built into your video meeting tool.
- **Writing assistance.** Examples: Grammarly, or the assistant you already chose.

AI Experimenter 21 - 30

Goal: shared structure, consistent results.

- **Team workspaces for your chosen assistant**, so prompts and work are shared rather than personal. Examples: the team or business plans of ChatGPT, Claude, or Gemini.
- **A shared prompt and use-case library.** Examples: Confluence, Google Docs, Notion. Notion AI adds assistance inside the same space.
- **Simple automation** for one recurring handoff. Examples: Make, Zapier.

AI Ready 31 - 40

Goal: connected systems, less re-explaining.

- **AI inside the suite you already use.** Examples: Gemini in Google Workspace, Microsoft 365 Copilot.
- **Integration and workflow automation** across systems. Examples: Make, n8n, Zapier.
- **Structured systems of record** that AI can draw on. Examples: Airtable, HubSpot, Salesforce.
- **Saved context features** in assistants. Examples: Claude Projects, custom GPTs in ChatGPT, Gems in Gemini.

AI Partner Material 41 - 50

Goal: one partner that carries your context and compounds.

- **A persistent AI partner** with long-term memory of your business, such as PureBrain.
- **Measurement and dashboards** to track baselines and results. Examples: Google Looker Studio, Microsoft Power BI.
- **Orchestration** of multi-step workflows across tools and agents, built on the integration layer from the previous tier.

Product names are trademarks of their respective owners. PureBrain is not affiliated with the third-party products listed.

THE AI PARTNERSHIP **BLUEPRINT**

Most AI is used like a vending machine: put a question in, take an answer out, walk away. The AI Partnership Blueprint describes a different relationship, one where AI amplifies the people in your business instead of replacing them, and can get more useful the longer you work together. It is the approach behind PureBrain, and you can apply its principles with any AI you use.

1

Identity: a named partner, not an anonymous tool

Give your AI a name and a defined role. It sounds small, but it can change how people work with it: they brief it, correct it, and build on yesterday's work instead of starting over.

2

Context: it knows your business

Start with core business context: what you sell, who you serve, how you sound, what matters. This is the "about our business" document from Data Readiness, put to work.

3

Memory: it remembers

A partner keeps what it learns: preferences, decisions, corrections, history. Persistent memory helps end the cycle of re-explaining your business every session.

4

Personalization: it fits how you work

The partner adapts to your processes, your voice, and your priorities, rather than asking you to adapt to a generic interface.

5

Growth: it can compound

Judge a partner by how it improves over months, not by a single answer. Every interaction can add context, and context is what turns generic output into useful work.

6

Human judgment stays in charge

AI handles the drafting, recall, and repetitive work. People keep the relationships, the decisions, and the accountability. A partnership amplifies your team; it does not replace it.

Apply it this week: choose one AI, give it a name and a role, share your business context document, and keep a running list of what you teach it. In 30 days, compare its work to day one.

NEXT STEP

YOUR 90-DAY **PLAN ON ONE PAGE**

WHEN	DO THIS
This week	Note your tier and your two lowest-rated areas. Choose one recurring task and one tool.
Days 1 – 30	Run the 30-day plans for your two weakest areas. Record a baseline for one metric.
Days 31 – 60	Review what stuck. Write it into how the team works. Start the 90-day items.
Days 61 – 90	Compare your metric to the baseline. Retake the assessment and compare the breakdown.



SEE WHAT AN AI PARTNER LOOKS LIKE

If you want to see how a named AI partner with persistent memory and your business context works in practice, we are happy to walk you through it. No pressure, and no obligation.

SCHEDULE A DEMO

MEET A PUREBRAIN

Visit purebrain.ai