SME AI, Cybersecurity & Infrastructure Readiness Checklist

UK edition - Version 1.0 - Updated 28 September 2026

Tick each statement that is true for your business today. Score: 0-15 Early stage, 16-29 Developing, 30-40 Ready. Interactive version: readyforai.telappliant.ai/resources/ai-readiness-checklist

1. Strategy & business goals

Make sure AI is solving a real business problem, not chasing a trend.

- ☐ We have written down 2-3 business problems AI could help with.
  Why it matters: Clear problems keep projects focused and measurable.
- ☐ Each problem has a measurable outcome (hours saved, calls answered, revenue).
  Why it matters: Without a baseline you cannot prove ROI.
- ☐ A named senior person owns our AI plans.
  Why it matters: Projects without an owner stall after the pilot.
- ☐ We have a realistic budget range for a first pilot.
  Why it matters: Avoids over-scoping and stalled approvals.
- ☐ We know which processes are repetitive, rule-based or high-volume.
  Why it matters: These are the quickest AI wins.
- ☐ We have agreed what we will NOT use AI for.
  Why it matters: Sets boundaries for staff and customers.
- ☐ We review AI opportunities at least twice a year.
  Why it matters: The tools change fast - so do the opportunities.

2. Data quality & ownership

AI is only as good as the data you feed it.

- ☐ We know where our key business data lives (CRM, spreadsheets, email, file shares).
  Why it matters: You cannot connect what you cannot find.
- ☐ Customer records are reasonably complete and de-duplicated.
  Why it matters: Messy data produces confident but wrong answers.
- ☐ Each important data set has a named owner.
  Why it matters: Owners keep data accurate and decide access.
- ☐ We can export data from our main systems in a standard format.
  Why it matters: Locked-in data blocks integrations.
- ☐ We know which data is personal or sensitive under UK GDPR.
  Why it matters: Sensitive data needs extra care before any AI use.
- ☐ Old and unused data is archived or deleted on a schedule.
  Why it matters: Less data means less risk and cleaner results.
- ☐ Key documents (policies, FAQs, price lists) are up to date and in one place.
  Why it matters: AI assistants answer from these - stale content means stale answers.

3. Cybersecurity basics

AI tools widen your digital footprint. Get the foundations right first.

- ☐ Multi-factor authentication (MFA) is on for email, cloud apps and admin accounts.
  Why it matters: MFA blocks the vast majority of account takeover attacks.
- ☐ Devices and software receive security updates automatically or within 14 days.
  Why it matters: Unpatched systems are the most common way in.
- ☐ We have tested backups that are stored separately from our main systems.
  Why it matters: Protects you from ransomware and accidental loss.
- ☐ We hold, or are working towards, Cyber Essentials certification.
  Why it matters: The UK government-backed baseline - often required for contracts.
- ☐ Staff receive regular phishing and security awareness training.
  Why it matters: AI-generated phishing is more convincing than ever.
- ☐ Access is removed promptly when staff leave or change roles.
  Why it matters: Old accounts are an easy target.
- ☐ We have a simple plan for what to do if we suffer a cyber incident.
  Why it matters: Minutes matter when containing an incident.

4. Infrastructure & connectivity

Reliable, connected systems let AI actually do useful work.

- ☐ Our core business apps are cloud-based or accessible via modern APIs.
  Why it matters: Most AI tools connect through cloud APIs.
- ☐ Our internet connection is reliable with a backup option.
  Why it matters: AI services stop when the connection does.
- ☐ Our phone system is cloud-based (VoIP) rather than a legacy line.
  Why it matters: Required for AI receptionists and call analytics - and the UK PSTN switch-off.
- ☐ Our CRM is actively used and connected to email and phones.
  Why it matters: The CRM is where AI adds the most day-to-day value.
- ☐ We have a list of all software subscriptions and who uses them.
  Why it matters: Avoids duplicate tools and shadow IT.
- ☐ We use a business (not personal) Microsoft 365 or Google Workspace tenancy.
  Why it matters: Business tenancies offer the admin and data controls AI needs.

5. Compliance & governance

Stay on the right side of UK law and customer trust.

- ☐ We have a written AI acceptable-use policy for staff.
  Why it matters: Stops staff pasting confidential data into public tools.
- ☐ We check where AI vendors store and process our data.
  Why it matters: UK GDPR restricts international transfers.
- ☐ We complete a DPIA for AI projects involving personal data.
  Why it matters: The ICO expects DPIAs for higher-risk processing.
- ☐ Our privacy notice explains any AI use affecting customers.
  Why it matters: Transparency is a legal and trust requirement.
- ☐ A human reviews AI decisions that significantly affect people.
  Why it matters: UK GDPR limits solely automated decisions.
- ☐ We keep a simple register of AI tools in use and their risks.
  Why it matters: Makes audits, renewals and incidents far easier.
- ☐ Contracts with AI vendors cover data use, retention and model training.
  Why it matters: Prevents your data being used to train others' models.

6. People, skills & change

Adoption fails on people far more often than on technology.

- ☐ Staff have been told how AI will (and will not) affect their roles.
  Why it matters: Openness reduces resistance and rumours.
- ☐ At least one person has hands-on training in business AI tools.
  Why it matters: Internal champions drive everyday use.
- ☐ Teams know how to write clear prompts and check AI output.
  Why it matters: Good prompting is the biggest quality lever.
- ☐ We have a way for staff to suggest AI ideas.
  Why it matters: The best use cases come from the front line.
- ☐ We plan to pilot small, then scale what works.
  Why it matters: Small pilots limit risk and build confidence.
- ☐ We will measure results 30, 60 and 90 days after launch.
  Why it matters: Keeps projects honest and funded.

My score: _____ / 40

Next step: arrange a free AI scoping call - 020 7043 3490 or visit readyforai.telappliant.ai/book