



IS YOUR FINANCE FUNCTION READY FOR AI?

Finance AI Readiness Checklist

Use this checklist to assess whether your finance and operations are ready to adopt AI and automation. Tick every item that is already true for your organisation, then use the scoring guide at the end.

1. Data readiness

- ☐ Key financial data is centralised and accessible
- ☐ Data is reasonably clean and structured (not just PDFs/scans)
- ☐ Sufficient historical data is available

2. Process readiness

- ☐ Core processes are documented
- ☐ Repetitive, rules-based tasks are identified
- ☐ Clear logic exists for the tasks to be automated

3. People & skills

- ☐ The team is open to AI and automation
- ☐ Basic data literacy exists in the team
- ☐ An internal champion / owner is identified

4. Use cases & governance

- ☐ High-ROI use cases are shortlisted
- ☐ Success metrics are defined for each use case
- ☐ Human-review checkpoints and audit trails are planned
- ☐ Data privacy and access controls are considered

Scoring guide

11–13 ticks

Ready — pick a use case and pilot now.

7–10 ticks

Nearly there — close a few gaps first.



0–6 ticks

Foundation stage — start with data and process readiness.

Want a guided assessment? We run a structured AI opportunity assessment and ship high-ROI pilots. Book a consultation at ajc.fly.dev/appointment.

Get in touch

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