Kanopi

AI Capability Readiness Checklist

Use the checklist below to identify which capability level best reflects your current AI maturity, and where your next focus should be.

Level 1: Foundational

- [ ] Most key workflows (e.g., claims, underwriting) are still manual or
- [ ] spreadsheet-based
- [ ] Core data sources are siloed and difficult to access
- [ ] There's no clear data governance or model risk framework
- [ ] No formal AI strategy; only ad hoc exploration
- [ ] AI or automation pilots haven't moved beyond isolated experiments
  No agreed-upon metrics for measuring AI effectiveness or ROI

Tip: Focus on building foundations: clean data, integration points, and clear governance.

Level 2: Emerging

- [ ] Some workflows include RPA or ML tools (e.g., document ingestion, fraud
- [ ] scoring)
- [ ] Business units are piloting AI solutions independently
- [ ] Some success with pilots; but scaling remains a challenge
- [ ] Limited AI skills within the broader workforce
- [ ] Key stakeholders (risk, compliance, IT) aren't yet aligned on AI adoption
- [ ] Model performance is assessed, but not continuously monitored

Tip: Prioritise cross-functional alignment and begin defining enterprise-wide AI guidelines.

Level 3: Operational

- [ ] AI is embedded in production workflows (e.g., underwriting, triage, claims validation)
- [ ] There are escalation paths and human-in-the-loop protocols in place
- [ ] Stakeholders have visibility into model decisions and confidence levels
- [ ] Data pipelines are reliable and version-controlled
- [ ] AI projects have clear owners and success metrics
- [ ] There's a centralised AI or data science capability supporting multiple functions

Tip: Focus on scale, resilience, and continuous improvement.

Level 4: Scaled

- [ ] AI is integrated across multiple decision points and functions
- [ ] A dedicated AI governance framework is in place and regularly reviewed
- [ ] Performance and fairness metrics are continuously tracked and audited
- [ ] Business users trust and understand AI recommendations
- [ ] There is an established change management and training process for AI adoption
- [ ] AI is part of the organisation's strategic roadmap not just tech delivery

Tip: Focus on optimisation, innovation, and sharing lessons across the industry.

How To Use This

- **As a team exercise:** Run through the checklist with your operations, data, or innovation teams.
- **To plan next steps:** Use it to prioritise investment areas and unblock capability gaps.
- **For leadership buy-in:** Show the gap between ambition and readiness and what realistic, staged progress looks like.

Got more questions?
Email us at hello@kanopicover.com