

AI READINESS SNAPSHOT - BRIGHTLEAF & CO

Where you stand with AI today and the three things to sort before you scale it.

A plain-English snapshot for Sam Whitfield, MD, showing what is already working, where governance needs to catch up, and the next sensible actions.

PREPARED FOR

Brightleaf & Co

PREPARED BY

Ready-Set-Go.AI

PHASE

Ready

CLASSIFICATION

Sample

SECTION 01

Sam, here is where Brightleaf stands today.

01

The good news: you are already further ahead than most businesses. Your team has started using AI on its own. The challenge is that you are moving faster than your governance.

PLAIN-ENGLISH READOUT

That is a fixable problem. You do not need to slow down. You need to make three basics real: clear AI rules, a data-access review, and a short list of high-value pilots.

What this means

Brightleaf has appetite, momentum and obvious use cases. The work is not to persuade the team that AI matters. The work is to make adoption controlled enough to scale.

What to avoid

The risk is not AI itself. The risk is letting public tools, unclear permissions and ad-hoc buying become the operating model before anyone has set expectations.

SECTION 02

At-a-glance scorecard

Each score maps to the assessment findings below. In a live report these are calculated, not assigned.

OPPORTUNITY

88%



HIGH

How much there is to gain from AI, done well.

READINESS

64%



AMBER

How ready the environment is to enable AI safely today.

RISK

42%



MANAGE

Exposure if AI scales before the basics are in place.

INTERPRETATION

Brightleaf has strong opportunity and moderate readiness. The right move is controlled enablement, not lockdown and not a free-for-all.

SECTION 03

What is working, and where the gaps are

03

What is already working

- ✓ Your team is engaged. People are using AI daily, unprompted.
- ✓ Adoption has already started. You are not at zero.
- ✓ The opportunities are obvious and close to the work.

Where the gaps are

- **Shadow AI.** Staff are pasting work into public AI tools with no rules.
- **Oversharing waiting to happen.** Copilot can surface anything staff can already open.
- **No shared expectations.** Without a one-page policy, everyone invents their own rules.
- **Buying before planning.** Subscriptions can accumulate without a real outcome.

Client reports

First drafts and proposals, with people owning the judgement.

Meeting actions

Summaries and action lists from client calls.

Knowledge search

Ask questions across the document library.

Inbox triage

Surface what needs attention and draft routine replies.

Onboarding

Turn know-how into reusable guidance.

SECTION 04

Recommended next actions

SAMPLE - FICTIONAL EXAM

/ 04

01

Publish a one-page AI usage policy this week.

Give staff a clear line between approved, restricted and prohibited use.

02

Run a data-access review before enabling Copilot.

Check what staff can already open before AI can surface it faster.

03

Pick two high-value use cases to pilot.

Start with client-report drafting and meeting summaries.

04

Name an owner and set a 90-day review.

AI needs an accountable business owner, not a floating enthusiasm project.

The outcome

✓ Clear AI rules everyone understands

✓ A controlled rollout, not a free-for-all

✓ Lower business and data risk

✓ More confident staff

✓ A roadmap the whole team can follow

Next step: a short Readiness conversation to turn this into a plan you can act on. We advise and direct; your IT partner implements.