



AI ENABLEMENT ASSESSMENT

Strategic AI Integration & Roadmap Development

CLIENT	ASSESSMENT DATE	PREPARED BY
[Company Name]	[Date]	[Your Name / Firm]

Strategy first. Technology second. Results always. This assessment guides you through a disciplined, four-phase process to identify where AI can drive real business value — and build the roadmap to get there.

How to Use This Template

This working document is designed to be completed collaboratively across your leadership team and key stakeholders. It follows the four phases of the HQ Partners AI Enablement methodology — from discovery through execution-ready roadmap.

- **Complete sequentially:** Each phase builds on the previous. Do not skip phases — the quality of your roadmap depends on the rigor of your discovery.
- **Be honest, not aspirational:** The most valuable insights come from documenting reality, not what you wish were true. Include gaps, concerns, and unknowns.
- **Engage broadly:** Involve stakeholders across business units, IT, data, finance, and operations. AI strategy is not an IT exercise.
- **Return and revise:** This document is a living assessment. Revisit quarterly and update as the organization learns and capabilities evolve.

**PHASE 1 · Discovery & Opportunity Assessment** (2–3 Weeks)

Objective: Understand your business, identify potential AI use cases, and assess current capabilities before any technology decisions are made.

1.1 Organization Context

Before identifying AI opportunities, establish a clear picture of the strategic context this assessment is operating within.

Strategic Priorities

[List the top 3–5 strategic priorities your organization is pursuing over the next 12–24 months. AI opportunities should connect to these.]

1. *[Strategic priority 1]*
2. *[Strategic priority 2]*
3. *[Strategic priority 3]*

Key Business Challenges

[What are the most significant operational, customer, competitive, or financial challenges the organization is facing? These are where AI may deliver the highest impact.]

4. *[Challenge 1 — include the business impact and how long it has been occurring]*
5. *[Challenge 2]*
6. *[Challenge 3]*

1.2 AI Readiness Assessment

Rate your organization's current readiness across each dimension on a scale of 1 (not ready) to 5 (fully ready). Be honest — gaps identified here shape the implementation plan.

READINESS DIMENSION	RATING (1–5)	NOTES & GAPS
Data availability and quality	<i>[1–5]</i>	
Technology and infrastructure maturity	<i>[1–5]</i>	



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Leadership alignment and sponsorship	[1–5]	
AI talent and capability	[1–5]	
Change management capacity	[1–5]	
Governance and compliance frameworks	[1–5]	
Budget and investment readiness	[1–5]	

READINESS SCORE <i>[Sum of ratings / 35 = X%]</i>	OVERALL READINESS ☐ Ready ☐ Partially Ready ☐ Not Ready	BIGGEST READINESS GAP <i>[The single most important gap to address before AI initiatives can scale]</i>
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1.3 AI Use Case Discovery

Document all potential AI use cases identified through business process review, stakeholder interviews, and workshops. Do not filter at this stage — capture everything. Prioritization happens in Phase 2.

Tip: Think across Operations, Customer Experience, Decision Support & Analytics, and Knowledge Work & Productivity. Refer to the HQ Partners AI Enablement Strategy document for category examples.

USE CASE / OPPORTUNITY	BUSINESS PROBLEM SOLVED	DEPT / FUNCTION	DATA AVAILABLE?	INITIAL PRIORITY
		[Dept]	[Y/N/Partial]	[H/M/L]
		[Dept]	[Y/N/Partial]	[H/M/L]

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		[Dept]	[Y/N/Partial]	[H/M/L]
		[Dept]	[Y/N/Partial]	[H/M/L]
		[Dept]	[Y/N/Partial]	[H/M/L]
		[Dept]	[Y/N/Partial]	[H/M/L]
		[Dept]	[Y/N/Partial]	[H/M/L]
		[Dept]	[Y/N/Partial]	[H/M/L]

1.4 Stakeholder Engagement Log

Document who participated in the discovery process to ensure the use case list reflects the full organization.

STAKEHOLDER / GROUP	ROLE / DEPT	ENGAGEMENT METHOD	KEY INSIGHTS CAPTURED
	[Title / Dept]	[Interview / Workshop / Survey]	
	[Title / Dept]	[Interview / Workshop / Survey]	
	[Title / Dept]	[Interview / Workshop / Survey]	
	[Title / Dept]	[Interview / Workshop / Survey]	
	[Title / Dept]	[Interview / Workshop / Survey]	

Phase 1 Deliverables Checklist



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- ☐ **Current** state assessment documentation complete
 - ☐ **Long** list of potential AI use cases (15–30 opportunities) captured
 - ☐ **Capability** and readiness assessment scored and reviewed with leadership
 - ☐ **Stakeholder** interviews complete — findings documented
 - ☐ **Industry** benchmarks and competitive analysis reviewed
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**PHASE 2 · Prioritization & Business Case Development (2–3 Weeks)**

Objective: Evaluate and prioritize use cases based on business value, feasibility, and strategic fit — and develop business cases for the top opportunities.

2.1 Use Case Prioritization Matrix

Score each use case across four dimensions. Use the composite score to rank and sequence initiatives. Score 1–5 on each dimension (5 = highest impact / easiest / lowest risk / strongest alignment).

IMPACT (35%) Revenue, cost savings, or competitive advantage potential	EFFORT (25%) Time, cost, and complexity to implement (5 = low effort)	RISK (15%) Implementation, data, or organizational risk (5 = low risk)	ALIGNMENT (25%) Connection to strategic priorities and leadership support
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Composite Score = (Impact × 35%) + (Effort × 25%) + (Risk × 15%) + (Alignment × 25%)

USE CASE	IMPACT (1–5)	EFFORT (1–5)	RISK (1–5)	ALIGNMENT (1–5)	SCORE	PRIORITY
	[1–5]	[1–5]	[1–5]	[1–5]	[Calc]	[H/M/L]
	[1–5]	[1–5]	[1–5]	[1–5]	[Calc]	[H/M/L]
	[1–5]	[1–5]	[1–5]	[1–5]	[Calc]	[H/M/L]
	[1–5]	[1–5]	[1–5]	[1–5]	[Calc]	[H/M/L]
	[1–5]	[1–5]	[1–5]	[1–5]	[Calc]	[H/M/L]
	[1–5]	[1–5]	[1–5]	[1–5]	[Calc]	[H/M/L]
	[1–5]	[1–5]	[1–5]	[1–5]	[Calc]	[H/M/L]

2.2 Top Use Cases — Detailed Business Cases

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For the top 5–7 use cases by composite score, document a business case summary. These will inform investment decisions and roadmap sequencing.

USE CASE	EST. INVESTMENT	EST. ANNUAL BENEFIT	PAYBACK PERIOD	ROI
	[\$XXX,XXX]	[\$XXX,XXX]	[X months]	[XXX%]
	[\$XXX,XXX]	[\$XXX,XXX]	[X months]	[XXX%]
	[\$XXX,XXX]	[\$XXX,XXX]	[X months]	[XXX%]
	[\$XXX,XXX]	[\$XXX,XXX]	[X months]	[XXX%]
	[\$XXX,XXX]	[\$XXX,XXX]	[X months]	[XXX%]

2.3 Data Requirements Assessment

For each priority use case, confirm what data is required and assess its availability and quality.

USE CASE	DATA REQUIRED	DATA AVAILABLE?	QUALITY RATING (1–5)	GAPS / ACTIONS NEEDED
[Use Case 1]		[Y/N/Partial]	[1–5]	
[Use Case 2]		[Y/N/Partial]	[1–5]	
[Use Case 3]		[Y/N/Partial]	[1–5]	
[Use Case 4]		[Y/N/Partial]	[1–5]	
[Use Case 5]		[Y/N/Partial]	[1–5]	



Phase 2 Deliverables Checklist

- ☐ **Prioritized** AI opportunity portfolio (top 5–7 use cases) agreed with leadership
 - ☐ **Business** case documentation complete for each priority use case
 - ☐ **ROI** projections and investment requirements defined
 - ☐ **Data** requirements and quality gaps identified for each priority use case
 - ☐ **Success** metrics and KPIs defined for each use case
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**PHASE 3 · Architecture & Governance Design** (3–4 Weeks)

Objective: Define the technical foundation and governance framework required for responsible, scalable AI implementation.

3.1 AI Architecture Assessment

Document the current state of your AI-relevant technical infrastructure and identify gaps that must be addressed before or during implementation.

COMPONENT	CURRENT STATE	REQUIRED STATE	GAP / ACTION NEEDED
Data Infrastructure			
ML / AI Platforms			
Cloud / Compute			
Data Quality & Pipelines			
Integration Middleware			
Security & Access Controls			
MLOps / Model Management			

3.2 AI Governance Framework

A governance framework is not optional — it protects the organization, builds trust, and enables responsible scaling. Document current state and required actions for each dimension.

GOVERNANCE DIMENSION	CURRENT STATE	TARGET STATE / ACTIONS NEEDED
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AI Usage Policy		
Data Privacy & Security Standards		
Model Risk Management		
Bias & Fairness Review Process		
Regulatory / Compliance Requirements		
Oversight & Approval Authority		

3.3 MLOps & Model Lifecycle Strategy

Define how AI models will be built, deployed, monitored, and retired. Without this, models degrade silently and risk becomes invisible.

MLOps DIMENSION	APPROACH / DECISION
Model development environment	
Version control for models and data	
Testing and validation standards	
Deployment approach (cloud / on-premises / hybrid)	
Monitoring and performance alerting	
Model retraining triggers and frequency	



**Model retirement and
replacement process**

Phase 3 Deliverables Checklist

- ☐ **AI** architecture blueprint documented — gaps and investment requirements identified
 - ☐ **AI** governance framework and policy recommendations drafted and reviewed
 - ☐ **Data** management and MLOps strategy defined
 - ☐ **Integration** and workflow design documentation complete
 - ☐ **Compliance**, security, and ethical AI guidelines established
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PHASE 4 · Roadmap Development & Execution Planning (2–3 Weeks)

Objective: Build a phased implementation plan that connects AI initiatives to your broader strategic objectives — and is designed to actually be executed.

4.1 AI Transformation Roadmap

Sequence all priority AI initiatives across implementation phases. Consider dependencies, quick wins, organizational readiness, and resource availability.

PHASE 1 — Foundation Quick wins, pilot projects, infrastructure foundations. Build confidence and momentum. (Months 1–6)	PHASE 2 — Scale Scale proven pilots. Add complexity. Expand use cases. Develop internal capability. (Months 7–18)	PHASE 3 — Transform Enterprise-wide integration. AI embedded in core operations. Competitive differentiation. (Months 19–24+)
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AI INITIATIVE	PHASE	TIMELINE	OWNER	INVESTMENT	STATUS
	[Phase 1/2/3]	[Q# YYYY]	[Name]	[\$XXX,XXX]	[Not Started]
	[Phase 1/2/3]	[Q# YYYY]	[Name]	[\$XXX,XXX]	[Not Started]
	[Phase 1/2/3]	[Q# YYYY]	[Name]	[\$XXX,XXX]	[Not Started]
	[Phase 1/2/3]	[Q# YYYY]	[Name]	[\$XXX,XXX]	[Not Started]
	[Phase 1/2/3]	[Q# YYYY]	[Name]	[\$XXX,XXX]	[Not Started]
	[Phase 1/2/3]	[Q# YYYY]	[Name]	[\$XXX,XXX]	[Not Started]
	[Phase 1/2/3]	[Q# YYYY]	[Name]	[\$XXX,XXX]	[Not Started]
	[Phase 1/2/3]	[Q# YYYY]	[Name]	[\$XXX,XXX]	[Not Started]



4.2 Pilot Project Definition

For the first initiative entering Phase 1 execution, define the pilot scope clearly. A well-defined pilot protects budget, builds confidence, and creates a replicable model.

PILOT DEFINITION ELEMENT	DETAILS
Pilot Use Case	
Business Problem Being Solved	
Scope (what is IN / OUT)	
Success Criteria (measurable outcomes)	
Required Data	
Technical Requirements	
Team & Resources	
Timeline (start → end date)	
Budget	
Go/No-Go Decision Point	

4.3 Vendor Evaluation & Partner Selection

Document vendors and platforms under consideration for each use case. HQ Partners maintains vendor-neutral positioning — we help you select the right partner for your needs, not ours.

VENDOR / PLATFORM	USE CASE(S) ADDRESSED	EVALUATION STATUS	ESTIMATED COST	NOTES / RECOMMENDATION
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		[Shortlisted / POC / Selected / Rejected]	[\$XX,XXX]/yr	
		[Shortlisted / POC / Selected / Rejected]	[\$XX,XXX]/yr	
		[Shortlisted / POC / Selected / Rejected]	[\$XX,XXX]/yr	
		[Shortlisted / POC / Selected / Rejected]	[\$XX,XXX]/yr	

4.4 RACI Matrix — AI Initiatives

Define clear ownership for each AI initiative and activity. Without explicit accountability, even well-designed programs stall. R = Responsible, A = Accountable, C = Consulted, I = Informed.

AI INITIATIVE / ACTIVITY	EXEC SPONSOR	AI PROGRAM LEAD	IT / DATA	BUSINESS OWNER	HQ PARTNERS
Use Case Identification	[R/A/C/I]	[R/A/C/I]	[R/A/C/I]	[R/A/C/I]	[R/A/C/I]
Business Case Development	[R/A/C/I]	[R/A/C/I]	[R/A/C/I]	[R/A/C/I]	[R/A/C/I]
Architecture Design	[R/A/C/I]	[R/A/C/I]	[R/A/C/I]	[R/A/C/I]	[R/A/C/I]
Governance Framework	[R/A/C/I]	[R/A/C/I]	[R/A/C/I]	[R/A/C/I]	[R/A/C/I]
Vendor Selection	[R/A/C/I]	[R/A/C/I]	[R/A/C/I]	[R/A/C/I]	[R/A/C/I]
Pilot Implementation	[R/A/C/I]	[R/A/C/I]	[R/A/C/I]	[R/A/C/I]	[R/A/C/I]
Change Management	[R/A/C/I]	[R/A/C/I]	[R/A/C/I]	[R/A/C/I]	[R/A/C/I]
ROI Tracking	[R/A/C/I]	[R/A/C/I]	[R/A/C/I]	[R/A/C/I]	[R/A/C/I]

4.5 Change Management Plan

AI adoption fails more often from organizational resistance than technical challenges. Document your change management approach here.

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CHANGE MANAGEMENT ELEMENT	APPROACH & ACTIONS
Key stakeholder concerns to address	
Communication plan (who, what, when, how)	
Training and capability building approach	
Executive sponsorship and visible leadership	
Early adopters / AI champions identified	
Feedback loops and adjustment mechanisms	

Phase 4 Deliverables Checklist

- ☐ **AI** transformation roadmap (12–24-month timeline) documented and leadership-approved
- ☐ **Pilot** project definition and success criteria agreed
- ☐ **Resource** plan and budget allocation confirmed
- ☐ **Vendor** evaluation criteria and shortlist complete
- ☐ **RACI** matrix for all AI initiatives documented
- ☐ **Change** management and training plan in place
- ☐ **Success** metrics and monitoring framework established



Success Metrics & KPI Tracking

Define how you will measure the impact of your AI enablement program. These metrics should be reviewed quarterly and reported to executive leadership.

SUCCESS METRIC / KPI	BASELINE	6-MONTH TARGET	12-MONTH TARGET	24-MONTH TARGET	OWNER
AI initiatives launched	[Current]	[Goal]	[Goal]	[Goal]	[Name]
Use cases in production	[Current]	[Goal]	[Goal]	[Goal]	[Name]
ROI realized to date	[Current]	[Goal]	[Goal]	[Goal]	[Name]
Employee AI adoption rate	[Current]	[Goal]	[Goal]	[Goal]	[Name]
Data quality score	[Current]	[Goal]	[Goal]	[Goal]	[Name]
Model performance (accuracy)	[Current]	[Goal]	[Goal]	[Goal]	[Name]
Cost savings attributed to AI	[Current]	[Goal]	[Goal]	[Goal]	[Name]
Revenue impact attributed to AI	[Current]	[Goal]	[Goal]	[Goal]	[Name]

Quarterly Review Framework

The AI landscape evolves rapidly. Schedule quarterly reviews to assess whether your strategy still holds — and course-correct based on what you have learned.

REVIEW QUESTION	ASSESSMENT / NOTES
Are our priority use cases still the right ones?	
Have any blockers been resolved — or new ones emerged?	
Is our readiness improving at the expected pace?	
Are pilot results meeting success criteria?	



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Have market or competitive conditions changed?	
Does our governance framework need updating?	
Are we investing in AI talent and capability development?	
Is leadership engagement and sponsorship strong?	

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The right questions change everything.

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