

# AI Maturity One Pager

Condensed sample assessment for SMBs: 10 core areas, gap analysis, prioritized use cases and a 90-day roadmap.

## OVERALL MATURITY

# 3.1/5

Pilot-ready with foundation gaps

Enough substance for a pilot, but governance, data access

## MATURITY RADAR



## DIMENSION SCORES

- Strategy** 3.4/5 ■ goals exist
- Organization** 2.0/5 ■ clarify roles
- Data** 2.6/5 ■ clean sources
- Technology** 2.1/5 ■ check APIs
- Processes** 3.5/5 ■ good levers
- Governance** 2.4/5 ■ rules missing
- Security** 2.8/5 ■ controls needed
- Use Cases** 3.7/5 ■ pipeline usable

## KEY INSIGHTS

### Highest value lever

Recurring email, document and knowledge processes create faster ROI than a generic chatbot.

### Main blocker

Unclear data ownership, scattered documents and inconsistent storage slow down reliable AI answers.

### Pilot readiness

A focused pilot with real data is realistic once success criteria and approvals are defined.

## RISKS & CONTROLS

### Privacy

Classify personal data, clarify data processing roles and avoid sensitive prompts.

### Hallucinations

Use source requirements, answer boundaries, human-in-the-loop and realistic test sets.

### Shadow AI

Document allowed tools, data classes and approval rules in a simple internal policy.

## METHODOLOGY & PREPARATION

### 10 core areas

Strategy, leadership, data, technology, talent, processes, use cases, culture, risk and measurement.

### Gap logic

Compare current maturity and target state, then prioritize gaps by impact, risk and effort.

### Client input

Prepare examples, systems, owners and metrics so the first pilot becomes measurable.

## USE-CASE PRIORITIZATION WITH BUSINESS VALUE

Use case	Value	90-day pilot	Metric
Email triage	Classify, prioritize and draft replies for requests	Inbox pilot with 3 categories	Time per ticket
Knowledge AI / RAG	Employees find policies, prices, processes and documents faster	Source-grounded assistant	Search time, accuracy
Document extraction	Extract structured data from PDFs, forms and receipts	Test 5 document types	Error rate
M365 Copilot readiness	Check permissions, data quality and usage rules	Data and rights check	Release readiness

## RECOMMENDED 90-DAY ROADMAP

1-15

### Sharpen focus

Score use cases, check data sources and risks.

16-45

### Build pilot

Prototype with real examples, test set and measurement.

46-90

### Decide rollout

Training, governance, operating model and budget frame.