



PORAJ SERVICES AUSTRALIA

AI Agent Readiness Worksheet

A plain-language worksheet for deciding whether an AI workflow is ready for a safe pilot.

Practical, plain-language tools for building better digital work.



Start with one workflow, not a whole business

Use this worksheet before buying an AI tool or automating a sensitive process. Complete it with the people who do the work, own the data, support customers, and approve risk.

Proposed AI use case: _____

Owner: _____ Team: _____ Date: _____

1. The task

What exact task do you want AI to help with?

Who performs it now, and how often?

What does a good result look like?

Which steps must always stay with a person?

2. Data and privacy

What information does the task use?

Does it include personal, financial, health, legal, employee, or confidential information?

Where is the information stored and who may access it?

Can you test with anonymous or synthetic data first?

3. Risk and oversight

What could go wrong if the AI output is incorrect, biased, delayed, or disclosed?

Who will review outputs before they affect a customer, employee, payment, or public decision?

What conditions should immediately stop the system?

How will people report problems and appeal a decision?

4. Tools and integration

Which existing tools, files, inboxes, or databases are involved?

Is there a secure integration method, or would staff copy and paste information manually?

Who owns the technical setup, credentials, updates, and incident response?

Can the workflow continue safely if the AI service is unavailable?

5. Value and measurement

What time, cost, quality, or service improvement do you expect?

What baseline will you compare against?

Which two or three measures will show whether the pilot worked?

What result would mean you should stop or redesign the idea?

Readiness score

Score each statement from 0 to 3: 0 = not started, 1 = partly understood, 2 = mostly ready, 3 = ready and evidenced.

Statement	Score 0-3	Evidence / action
The task, owner, boundary, and desired result are clear.		
The data has been classified and privacy controls are agreed.		
A person reviews important outputs and can override the system.		
Risks, stop conditions, escalation, and incident reporting are defined.		
Secure tools, integrations, access, and fallback steps are available.		
Baseline measures, pilot measures, and a review date are agreed.		

Total: _____ / 18

0-6: pause and clarify. 7-12: run a small, low-risk pilot with safeguards. 13-18: ready for a controlled pilot and documented review.

Pilot decision

☐ Pause and clarify ☐ Pilot with conditions ☐ Proceed to controlled pilot

Conditions and next actions:

Approved by: _____ Review date: _____

Use your readiness score to choose the right level of help

The best AI project is not always the biggest one. A focused pilot, a named owner and clear human checks usually create better evidence and safer decisions.

0-6	Clarify the opportunity Define the task, data and owner before selecting a tool or promising automation.
7-12	Design a low-risk pilot Limit the scope, use safer data, document human review and agree on success measures.
13-18	Build and measure Create a controlled pilot, monitor the results and decide whether to improve, scale or stop.

Poraj may be a good implementation partner when:

- You need a custom AI agent that fits an existing workflow.
- Your team needs privacy, human review and fallback steps designed in.
- You want a working pilot with measurable success criteria.

Discuss a controlled AI pilot

Bring your completed score and one workflow idea. We will help you identify a sensible next step and explain what implementation would involve. No obligation.

<https://www.porajservicesaustralia.com.au/contact.html>