

EXECUTIVE ASSESSMENT REPORT · SEPTEMBER 2026

# AI Readiness Assessment Sample Executive Report

Use-case portfolio, platform fit, unit economics, governance and executive roadmap.

*From strategy and pilots to production outcomes.*

**Illustrative sample.** The organization, findings, scores, costs, benefits and roadmap in this report are fictional examples designed to show the structure of a Pronix.ai deliverable. They are not a client result, commitment or forecast.

6

Readiness dimensions

8

Illustrative use cases

18 mo

Roadmap horizon

Prepared for enterprise leaders evaluating an evidence-based path from AI ambition to production.

DECISION BRIEF

# Ready to validate value— not yet ready to scale broadly.

01

The illustrative enterprise has sufficient executive sponsorship, cloud foundations and integration capability to advance three bounded use cases. Scale should remain gated until business baselines, evaluation evidence, production ownership and data permissions are strengthened.

**Proceed**

Fund a 10–12 week validation motion for agent assist, knowledge retrieval and document intake.

**Fix first**

Establish approved baselines, golden test sets, role-based access and named run-state owners.

**Do not scale yet**

Defer autonomous actions and broad employee rollout until controls and unit economics are proven.

**56/100**

Illustrative composite readiness

**3**

Use cases recommended for Wave 1

**Gate 1**

Funding request: controlled validation

Leadership decisions required

| DECISION       | RECOMMENDATION                                                                                        | OWNER                               |
|----------------|-------------------------------------------------------------------------------------------------------|-------------------------------------|
| Where to start | Prioritize assistive and document workflows with measurable baselines and human review.               | Executive sponsor + business owners |
| What to fund   | Approve a gated validation budget; release production funding only after acceptance criteria are met. | CFO + steering committee            |
| How to govern  | Stand up a cross-functional AI intake and risk forum with named production accountability.            | CAIO/CIO + Risk                     |

**Sample interpretation:** readiness is not a single maturity label. It is evidence for a decision: proceed, remediate, validate or stop.

EVIDENCE MODEL

# Readiness is assessed against the decisions leadership must make.

02

A practitioner-led assessment combines interviews, artifact review, system evidence and financial baselines. Scores reflect the strength of decision evidence—not enthusiasm for AI.

**Stakeholders**  
Executive sponsor, business owners, finance, enterprise architecture, data, integration, security, risk/legal, operations and change leaders.

**Evidence reviewed**  
Strategy and portfolio, process volumes, KPI baselines, architecture, APIs, identity, policies, contracts, incident history, skills and operating procedures.

**Calibration**  
Each dimension is scored from 1 (ad hoc) to 5 (repeatable and measured). Critical controls can override the numeric average.

1**Use-case portfolio**  
Strong sponsor interest; weak baselines and inconsistent ownership.

2**Platform fit**  
Cloud and integration standards exist; model and agent choices remain fragmented.

3**Business case**  
Value hypotheses exist, but unit economics and run costs are incomplete.

4**Operating model & governance**  
Policy foundation exists; intake, risk tiers and production ownership need definition.

5**Data, integration & security**  
Core APIs are available; permissions, knowledge quality and evaluation evidence are gating items.

6**Executive roadmap**  
Initiatives are not yet sequenced through shared investment and decision gates.

## Engagement flow

|                                                                |                                                            |                                                   |                                                 |                                                    |                                                   |
|----------------------------------------------------------------|------------------------------------------------------------|---------------------------------------------------|-------------------------------------------------|----------------------------------------------------|---------------------------------------------------|
| <div>01<b>Intake</b><br/>Decisions and evidence standard</div> | <div>02<b>Discover</b><br/>Use cases and constraints</div> | <div>03<b>Assess</b><br/>Readiness and risk</div> | <div>04<b>Model</b><br/>Fit and economics</div> | <div>05<b>Roadmap</b><br/>Sequence and gates</div> | <div>06<b>Readout</b><br/>Fund, fix or stop</div> |
|----------------------------------------------------------------|------------------------------------------------------------|---------------------------------------------------|-------------------------------------------------|----------------------------------------------------|---------------------------------------------------|

Typical duration: 2–4 weeks for one domain; 4–6 weeks for a multi-business-unit portfolio. Actual scope depends on evidence availability and stakeholder access.

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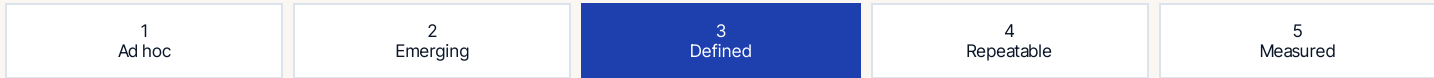
AI Readiness Assessment — Illustrative sample, not a client result

03

CURRENT-STATE FINDING

# Six dimensions reveal where value can move —and what blocks it.

03



### Strengths

Executive sponsorship; established cloud landing zones; reusable APIs; business interest concentrated in measurable workflows.

### Gating constraints

Incomplete baselines; uneven knowledge quality; unclear production ownership; no shared evaluation standard.

### Implication

Advance bounded use cases while funding the controls and data work required for repeatable production delivery.

**Scoring rule:** a high composite score cannot offset a critical security, legal, data-access or operating-ownership gap. Gating evidence is reviewed separately.

PORTFOLIO DECISION

# Prioritize workflows, not technology demos.

04

The illustrative portfolio favors use cases with measurable demand, human review, accessible data and a clear operating owner. High-autonomy workflows remain gated.

| USE CASE                            | VALUE  | FEASIBILITY | RISK   | RECOMMENDATION |
|-------------------------------------|--------|-------------|--------|----------------|
| Agent assist for service operations | High   | High        | Medium | Wave 1         |
| Enterprise knowledge retrieval      | High   | High        | Medium | Wave 1         |
| Document intake & classification    | High   | High        | Low    | Wave 1         |
| Customer self-service agent         | High   | Medium      | High   | Wave 2         |
| Finance exception resolution        | Medium | High        | Medium | Wave 2         |
| Sales proposal copilot              | Medium | High        | Medium | Wave 2         |
| Autonomous account changes          | High   | Low         | High   | Hold           |
| Broad employee copilot              | Medium | Medium      | Medium | Foundation     |

Wave 1 criteria

Named owner, trusted baseline, accessible content/data, human review, bounded action space and measurable acceptance criteria.

Wave 2 criteria

Wave 1 evidence, integration hardening, model evaluation, production support design and approved economics.

Stop / hold criteria

Unclear accountability, unavailable data, unbounded actions, no audit trail or economics that fail under conservative assumptions.

Illustrative prioritization only. Actual portfolio scores are built from client workshops, technical evidence, risk review and finance-approved baselines.

ARCHITECTURE DECISION

# Select the platform path against the enterprise estate.

05

Platform fit is a workload decision. Model quality matters, but identity, data location, integration, observability, commercial controls and run-state ownership often determine what can ship.

| CRITERION         | EVIDENCE REQUIRED                                  | ILLUSTRATIVE FINDING                                   | DECISION IMPACT                              |
|-------------------|----------------------------------------------------|--------------------------------------------------------|----------------------------------------------|
| Workload fit      | Interaction pattern, latency, context, tool use    | Assistive retrieval and classification dominate Wave 1 | Favor modular model access and orchestration |
| Enterprise estate | Cloud, CRM, CCaaS, data and API standards          | Existing cloud controls are reusable                   | Reduce net-new control surface               |
| Identity & data   | Entitlements, residency, retention, lineage        | Document permissions need remediation                  | Gate retrieval rollout by corpus             |
| Evaluation        | Golden sets, quality thresholds, red-team evidence | No shared test harness exists                          | Fund evaluation foundation in Wave 1         |
| Economics         | Consumption, licenses, engineering, support        | Run cost not yet modeled per workflow                  | Require unit-cost instrumentation            |
| Operations        | SLOs, fallback, incident and model-change process  | Ownership split across teams                           | Name one accountable service owner           |

**Recommended architecture posture:** preserve portability at the orchestration and evaluation layers; choose models and managed services by workload; reuse approved cloud, identity and observability controls.

Pronix works across major cloud, model, CRM and CX ecosystems. The assessment recommendation is based on client fit rather than a universal vendor ranking.

FINANCIAL EVIDENCE

06

# Build the case from units the business already manages.

The sample model separates capacity value, hard-dollar savings, risk avoidance and growth. Only benefits accepted by Finance should enter the approval case.

**Baseline units**

Annual eligible volume, minutes per task, fully loaded labor rate, error/rework rate, escalation rate and current technology cost.

**Investment units**

Discovery, engineering, integration, security, change, platform consumption, licenses, evaluation and ongoing support.

**Benefit units**

Time released, external spend avoided, error reduction, conversion improvement or risk exposure reduced—each with an owner.

**\$420K**

Illustrative Year 1 investment

**\$540K–\$880K**

Illustrative annualized gross value range after adoption

**12–20 mo**

Illustrative ramp-adjusted payback range

**–14%–57%**

Illustrative simple ROI range at steady-state annual value

**Transparent formulas**

Gross capacity value = eligible volume × minutes saved × loaded cost per minute × adoption × realization factor

Net benefit = approved gross benefit – incremental annual run cost

Simple ROI = (net benefit – one-time investment) ÷ one-time investment

Payback months = one-time investment ÷ monthly net benefit

All figures above are fictional sample assumptions. Capacity released is not automatically a cash saving. Finance should classify each benefit and approve the realization method.

PRODUCTION ACCOUNTABILITY

# Govern the workflow across its full operating life.

07

**Intake**  
Common template for business problem, owner, baseline, data, risk, autonomy and expected value.

**Risk tier**  
Classify impact, data sensitivity, user exposure and action authority before design begins.

**Evidence gate**  
Require evaluation results, control tests, red-team findings and acceptance criteria before release.

**Human oversight**  
Define review, override, escalation and fallback for each decision or action path.

**Run ownership**  
Name the service owner for quality, cost, incidents, changes, vendors and retirement.

**Value governance**  
Track adoption, unit cost, benefit realization and control health after launch.

Illustrative accountability model

| ROLE                     | ACCOUNTABILITY                                    | DECISION RIGHTS                                       |
|--------------------------|---------------------------------------------------|-------------------------------------------------------|
| Executive sponsor        | Strategic outcome and funding                     | Approve stage gates and material scope changes        |
| Business owner           | Baseline, workflow adoption and realized value    | Accept business performance                           |
| AI product/service owner | End-to-end production service                     | Prioritize backlog; stop service when thresholds fail |
| Architecture & data      | Platform, integration, data and evaluation design | Approve technical patterns and exceptions             |
| Security, risk & legal   | Controls, policy, privacy and compliance          | Approve risk treatment or block release               |
| Finance                  | Investment assumptions and benefit realization    | Validate business case and release funding gates      |

**Control principle:** autonomy should expand only when evaluation evidence, rollback, auditability and accountable human ownership expand with it.

GAP MAP

08

# Remediate the constraints tied to priority use cases first.

| AREA          | CURRENT-STATE EVIDENCE                     | GAP    | PRIORITY ACTION                               | OWNER           |
|---------------|--------------------------------------------|--------|-----------------------------------------------|-----------------|
| Knowledge     | Multiple repositories; mixed metadata      | High   | Curate Wave 1 corpus; assign content owners   | Business + Data |
| Entitlements  | Role rules differ by source                | High   | Enforce source permissions through retrieval  | IAM + Security  |
| APIs          | Core APIs available; uneven error handling | Medium | Add idempotency, fallback and audit events    | Integration     |
| Evaluation    | Ad hoc prompt testing                      | High   | Create golden sets and release thresholds     | AI Engineering  |
| Observability | Infrastructure monitoring only             | Medium | Add quality, cost, safety and drift telemetry | Service Owner   |
| Privacy       | Policy exists; workflow mapping incomplete | Medium | Map purpose, retention and user disclosures   | Privacy + Legal |

Release blocker

Any workflow exposing restricted content outside source-system permissions.

POC condition

Use approved synthetic or masked data until retention and entitlement controls pass.

Production evidence

Signed control checklist, evaluation results, operational runbook and rollback test.

A gap map is use-case-specific. An enterprise can be ready for one bounded workflow while remaining unready for higher-autonomy or higher-risk use cases.

SEQUENCED ACTION

# Fund evidence in stages, then scale what proves itself.

09

First 90 days

0-30 DAYS

Mobilize

Confirm sponsors, baselines, use-case owners, data scope, risk tier and acceptance criteria. Establish AI intake and decision forum.

31-60 DAYS

Validate

Build evaluation harness, platform spike and workflow prototype. Test quality, security, integration and unit cost with representative users.

61-90 DAYS

Decide

Complete controlled pilot, validate adoption and economics, close critical controls and present the production funding decision.

6 / 12 / 18-month horizon

6 MONTHS

Prove repeatability

Wave 1 production; common evaluation, intake, cost and support patterns.

12 MONTHS

Expand portfolio

Wave 2 launches; reusable integrations; measurable benefit realization.

18 MONTHS

Scale operating model

Portfolio governance, platform standards and managed run across domains.

| GATE               | EVIDENCE REQUIRED                                                 | FUNDING DECISION                     |
|--------------------|-------------------------------------------------------------------|--------------------------------------|
| G1— Validate       | Baseline, owner, data access, risk tier, POC acceptance criteria  | Release controlled validation budget |
| G2 — Productionize | Quality, controls, unit cost, user evidence, operating owner      | Release implementation funding       |
| G3 — Scale         | Stable performance, realized value, reusable controls and support | Release portfolio expansion funding  |

BOARD-READY ONE-PAGE DECISION

# Approve a gated AI validation investment

\$420K

Illustrative Year 1 investment cap

Illustrative enterprise · Decision requested: release Gate 1 budget

Business problem

High-volume service and document workflows consume specialist capacity, create avoidable rework and slow customer resolution. Existing AI pilots lack shared controls and finance-approved baselines.

Proposed investment

Fund three bounded Wave 1 use cases plus evaluation, security, integration, change and operating-model foundations. Production release remains subject to Gate 2 evidence.

Decision needed

Approve the validation envelope, named business owners and Finance participation. Do not authorize broad rollout or autonomous actions at this stage.



| SCENARIO     | ADOPTION | ANNUAL GROSS VALUE | ANNUAL RUN COST | PAYBACK INCL. RAMP |
|--------------|----------|--------------------|-----------------|--------------------|
| Conservative | 35%      | \$540K             | \$180K          | ~20 months         |
| Expected     | 55%      | \$710K             | \$195K          | ~15 months         |
| Upside       | 70%      | \$880K             | \$220K          | ~12 months         |

Funding controls

Monthly spend cap; benefit owner by use case; baseline signed by Finance; security and evaluation approval; stop/go decision at each gate; production funding released only after acceptance criteria.

Measures after approval

Adoption, quality, minutes per task, rework, escalation, unit cost, service incidents, realized cash/capacity benefit and variance from approved assumptions.

**Finance note:** all amounts are fictional examples. Replace every baseline, cost, benefit, adoption rate and realization factor with client-approved evidence before this page enters a budget process.

MODEL TRANSPARENCY

# ROI model: assumptions, formulas and sensitivity.

A1

| INPUT                              | CONSERVATIVE | EXPECTED | UPSIDE              | EVIDENCE OWNER       |
|------------------------------------|--------------|----------|---------------------|----------------------|
| Eligible annual interactions/tasks | 600,000      | 750,000  | 900,000             | Operations           |
| Average minutes released           | 1.5          | 2.0      | 2.4                 | Process owner        |
| Adoption / eligible usage          | 35%          | 55%      | 70%                 | Product owner        |
| Realization factor                 | 40%          | 55%      | 65%                 | Finance              |
| Quality/rework benefit             | Limited      | Moderate | Validated expansion | Quality owner        |
| Annual run cost                    | \$180K       | \$195K   | \$220K              | Technology + Finance |

Cost categories

**One-time delivery**

Discovery, design, engineering, integration, testing and launch.

**Platform & model**

Licenses, consumption, storage, evaluation and observability.

**Change & adoption**

Training, process redesign, communications and workflow support.

**Run state**

Service ownership, monitoring, incidents, optimization and vendor management.

Benefit classification

**Cashable**

External spend or budget removed with an approved realization action.

**Capacity**

Time released and redeployed to named work; not automatically a saving.

**Risk / growth**

Avoided exposure or incremental margin, included only with evidence and Finance approval.

**Sensitivity requirement:** recalculate ROI at lower adoption, lower time release, higher run cost and delayed launch. The conservative case—not the upside case—should support the funding decision.

LEADERSHIP TOOLKIT

# Templates to carry into the working session.

A2

## Use-case scoring rubric

Business value 25% · feasibility 20% · data readiness 15% · risk/control readiness 15% · adoption 10% · unit economics 15%.

## Platform-fit checklist

Workload · estate alignment · identity · data location · integration · evaluation · operations · commercial model.

## Business-case inputs

Eligible volume · baseline time/cost · defects · adoption · realization factor · build cost · run cost · benefit owner.

## Governance checklist

Sponsor · owner · risk tier · data approval · evaluation · human oversight · rollback · incident response · monitoring.

## Minimum evidence before each decision

| DECISION         | MINIMUM EVIDENCE                                                                                                                   |
|------------------|------------------------------------------------------------------------------------------------------------------------------------|
| Enter POC        | Named problem and owner, measurable baseline, representative data, risk tier, success criteria and budget cap.                     |
| Enter production | Acceptance tests, control approval, unit cost, runbook, support owner, user evidence and approved benefit realization plan.        |
| Scale            | Stable performance, realized value, repeatable architecture and controls, support capacity and portfolio-level governance.         |
| Stop             | Economics fail under conservative assumptions, evidence quality is insufficient, risk cannot be controlled or ownership is absent. |

## NEXT STEP

# Turn your evidence into an executive roadmap.

Book an AI Readiness Assessment working session or start with the free scorecard.

[pronix.ai/book](https://pronix.ai/book)

[pronix.ai/services/ai-readiness-assessment](https://pronix.ai/services/ai-readiness-assessment)

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