



# IntelliSync AI Readiness Assessment

Canadian SME Edition

A Diagnostic Framework for Responsible AI Adoption

Prepared by IntelliSync Solutions

## Section 1: Business Context & Strategy

Purpose: Understand if the business has a clear strategic direction for AI adoption.

- Do you have a documented business strategy that includes innovation or digital transformation goals?
- Have you identified priority pain points or opportunities where AI could deliver measurable value (e.g., customer service, finance, operations)?
- Does your leadership team understand the difference between AI hype and practical applications for SMEs?
- Is there an allocated budget or resource plan for technology adoption in the next 12–24 months?

### Scoring:

- 0 = No strategy or unclear direction
- 1 = General digital plan, but no AI specifics
- 2 = Clear digital/innovation goals, AI mentioned in theory
- 3 = AI opportunities defined with leadership alignment
- 4 = AI linked to core business strategy with resource plan

## Section 2: Data Readiness

Purpose: Assess whether data is usable, secure, and compliant with Canadian laws.

- Do you collect and store structured business data (e.g., CRM, financial, HR)?
- Is your data clean, reliable, and accessible for analysis?
- Are you compliant with Canadian privacy regulations (PIPEDA, Quebec's Law 25, sectoral standards like HIPAA for healthcare)?
- Do you have policies on data ownership, consent, and retention?
- Are you prepared for upcoming AI & Data Act (Bill C-27) requirements?

### Scoring:

- 0 = Little to no organized data, non-compliant risks
- 1 = Some data systems, but siloed or incomplete
- 2 = Basic compliance, but limited data governance
- 3 = Good quality data, documented policies, improving compliance
- 4 = Enterprise-grade data readiness with strong governance and privacy by design

## Section 3: Technology & Infrastructure

Purpose: Check if IT systems can support AI integration.

- Do you use cloud-based tools or platforms (Azure, AWS, Google Cloud, Canadian data centres)?
- Do you have APIs or integrations that allow systems to connect?
- Is your IT infrastructure secure, scalable, and monitored?
- Do you currently use any automation or analytics tools?
- Can your business handle AI model costs, compute, or storage needs?

### Scoring:

- 0 = Legacy systems, no cloud adoption
- 1 = Basic digital tools but no integrations
- 2 = Some automation, limited scalability
- 3 = Integrated systems, secure, some automation in place
- 4 = Cloud-native, API-ready, secure, and scalable

## Section 4: People & Culture

Purpose: Evaluate team readiness and openness to AI adoption.

- Do employees currently use AI tools informally (ChatGPT, Canva AI, transcription apps)?
- Is there an AI literacy or training program in place?
- Does leadership promote experimentation with AI safely?
- Is there a plan for change management and reskilling employees?
- Do you have policies to address bias, ethics, and inclusivity in AI adoption?

### Scoring:

- 0 = No AI awareness, culture resistant to change
- 1 = Some informal use, but no policies or training
- 2 = Basic awareness and training, limited leadership direction
- 3 = Leadership-led adoption, some structured training
- 4 = AI-native culture, ongoing training, employee buy-in

## Section 5: Governance, Risk & Compliance

Purpose: Ensure AI use is ethical, transparent, and compliant.

- Do you have an AI Policy for internal and external use?
- Have you performed a risk assessment of AI adoption (bias, privacy, cybersecurity, reputational)?
- Do you have legal or compliance advisors aware of AI-related risks?
- Are you familiar with Canadian & international standards (ISO AI guidelines, OECD principles, EU AI Act)?
- Is there a plan for ongoing monitoring and audits of AI systems?

### Scoring:

- 0 = No AI policy or awareness of risks
- 1 = Early discussion of risks, no documented framework
- 2 = Some policies exist, limited enforcement
- 3 = Documented AI policy and compliance monitoring
- 4 = Full AI governance framework with risk register and audit process

## Section 6: ROI & Measurement

Purpose: Gauge ability to track business value from AI.

- Do you have KPIs or metrics linked to business outcomes (time saved, cost reduction, revenue growth)?
- Are you measuring ROI on technology investments today?
- Do you plan to use AI dashboards or analytics tools for monitoring?
- Have you defined short-term wins vs. long-term transformation goals?

### Scoring:

- 0 = No measurement framework
- 1 = General business KPIs, not linked to tech/AI
- 2 = Some ROI metrics, loosely tied to digital tools
- 3 = Clear AI-linked KPIs, measured at department level
- 4 = Full enterprise-wide measurement of AI outcomes

## Final Score & Interpretation

Total Possible Points: 24

- 0–8 (Beginner): High risk of wasted investment. Focus on digital basics, compliance, and strategy alignment first.
- 9–15 (Emerging): Some foundations in place. Start with pilot projects and staff training.
- 16–20 (Scaling): Strong readiness. Expand AI projects across workflows with monitoring.
- 21–24 (AI-Native): Fully prepared for AI integration. Focus on continuous innovation and governance.

## Canadian SME Notes

- Funding & Incentives: Explore CDAP, IRAP, SR&ED; tax credits for R&D;/AI projects.
- Privacy & Law: Ensure compliance with PIPEDA, provincial laws (e.g., Quebec Law 25), and prepare for AIDA (Bill C-27).
- Local Ecosystem: Tap into local accelerators, Chambers of Commerce, and Canadian AI hubs (Toronto, Montreal, Edmonton).