

FREE SELF-REVIEW GUIDE

AI Governance Readiness Check

for B2B Teams

Know where to start.

A practical starting point for understanding AI use, accountability and customer trust.

10

readiness questions

10 min

to get started

3

first actions

Includes a fillable check and action worksheet.

Ruchira Agrawal

B2B Strategy

AI Governance Readiness Check

for B2B Teams

A 10-minute starting point for understanding AI use, accountability and customer trust.

Company / team

Date

Choose one response per question. Use **Yes** when a current practice is supported by evidence. Use **Partly** for incomplete coverage and **Unknown** when you need to verify the answer. Fill digitally or print.

01 Can you list where AI is used across your products, employee tools and third-party services?

Look for a current inventory that includes pilots, integrations and embedded AI.

☐ Yes ☐ Partly ☐ No ☐ Unknown

02 Does each AI use case have a named owner responsible for its oversight?

Look for a person with clear responsibilities and authority to act.

☐ Yes ☐ Partly ☐ No ☐ Unknown

03 Is there a defined approval process for new AI uses and material changes?

Look for review criteria, decision owners and recorded approvals.

☐ Yes ☐ Partly ☐ No ☐ Unknown

04 Do teams understand what personal, sensitive or confidential data enters AI systems?

Look for data flows, handling rules and review of retention and training settings.

☐ Yes ☐ Partly ☐ No ☐ Unknown

05 Do employees have clear guidance on approved AI tools and permitted data use?

Look for practical rules, accessible guidance and examples of staff training.

☐ Yes ☐ Partly ☐ No ☐ Unknown

Complete your readiness check

Consider the evidence available for the AI uses in your team. Note significant differences between use cases when planning your next steps.

06 Are AI vendors reviewed for data practices, important dependencies and service changes?

Look for reviewed terms, settings, supplier evidence and change notifications.

- ☐ Yes ☐ Partly ☐ No ☐ Unknown

07 Can people review, challenge or stop consequential AI decisions and actions?

Look for intervention points, override authority and a workable fallback.

- ☐ Yes ☐ Partly ☐ No ☐ Unknown

08 Has each priority AI use been evaluated for relevant risks, with limitations documented?

Look for appropriate accuracy, privacy, security and fairness evaluation records.

- ☐ Yes ☐ Partly ☐ No ☐ Unknown

09 Is there a clear route for reporting AI errors, complaints or harm?

Look for named response owners, escalation steps and incident records.

- ☐ Yes ☐ Partly ☐ No ☐ Unknown

10 Can your team substantiate the AI claims it makes to customers?

Look for current evidence behind statements about capabilities, data use and safeguards.

- ☐ Yes ☐ Partly ☐ No ☐ Unknown

What your answers tell you

No or Partly: identify the specific gap, affected use case and accountable owner.

Unknown: assign someone to verify the facts and obtain the relevant records.

Yes: check that the practice applies to the actual use case and remains current.

Review consequential decisions, sensitive data and unsupported customer claims promptly with the relevant owners. A count of Yes answers does not establish safety, maturity or legal compliance.

Turn your answers into first actions

Choose one action in each area below. Keep the action specific and identify an owner and a date. Serious issues may need attention before the rest of the plan.

1 Map missing facts and ownership

If questions 1-3 are No, Partly or Unknown, identify the AI use cases in scope, their owners and the approval route. Request missing records.

Your action, owner and target date

2 Review a use case needing early attention

Use questions 4 and 6-8 to select a case involving sensitive information, consequential decisions or uncertain safeguards. Ask the relevant specialists to review it.

Your action, owner and target date

3 Align guidance and customer communication

Use questions 5, 9 and 10 to improve employee rules, reporting routes or evidence behind customer claims. Give each change an accountable owner.

Your action, owner and target date

Need help defining the next steps?

An AI Governance Readiness Assessment brings stakeholder interviews and evidence together to identify priority gaps and develop a practical 90-day roadmap. Discuss your use cases, priorities and scope with Ruchira Agrawal.

Discuss an assessment

ruagrawal.com

Original self-review guide by Ruchira Agrawal, informed by the NIST resources below.

Resources: NIST AI RMF 1.0 - doi.org/10.6028/NIST.AI.100-1

NIST Generative AI Profile - doi.org/10.6028/NIST.AI.600-1