bevel & sloane

FIELD MANUAL SERIES
B&S-R06

AI READY

FREE CHECK

WORKFORCE ENABLEMENT · FIELD MANUAL 06

THE AI ENABLEMENT *Readiness Check*

Your team is likely using AI already. This check scores your policy, use cases and training gaps, then lays out a first 30 day rollout.

1. Policy
2. Use cases
3. Training gaps
4. First 30 day rollout

DOCUMENT	VERSION	ISSUED	CHECKS
B&S-R06	1.0	November 2026	15 checks, 30 points

WHY THIS MATTERS NOW

YOU BOUGHT THE TOOLS. NOW WHAT?

Buying licenses is the easy part. The value shows up only when people know what they are allowed to do, which tasks are worth it, and how the work should change. Score each check 0, 1 or 2: not in place, partly, fully.

1 in 10

Half of small business workers use AI. Only about 1 in 10 were offered formal AI training.

US Chamber of Commerce Foundation and Ipsos, June 2026

80%

of workers say they lack the time or energy to do their work.

Microsoft Work Trend Index, 2025

47%

of leaders rank upskilling existing staff as a top workforce strategy.

Microsoft Work Trend Index, 2025

SECTION A POLICY

5 CHECKS · 10 PTS

01	☐	**A written AI use policy exists.** It is short, in plain language, and every employee has seen it.	0 1 2
02	☐	**Approved tools are named.** The policy lists which tools are allowed and which uses are off limits.	0 1 2
03	☐	**Data rules are explicit.** It says exactly what may never be entered into an AI tool: client data, personal data, financials, contracts.	0 1 2
04	☐	**Someone owns AI decisions.** One named role approves new tools and use cases and updates the policy.	0 1 2
05	☐	**Human review is required where it counts.** Anything customer facing, legal or financial is checked by a person before it goes out.	0 1 2

SECTION A SUBTOTAL ____ / 10

SECTION B USE CASES

5 CHECKS · 10 PTS

06 ☐ **You know where AI is already used.** You have asked teams what they use today, including tools nobody approved. (0) (1) (2)

07 ☐ **Two or three priority use cases are chosen.** Each is tied to a time, quality or cost measure, not just "productivity." (0) (1) (2)

08 ☐ **Each use case has a written workflow.** An SOP shows where AI fits in the process and who checks the output. (0) (1) (2)

09 ☐ **A baseline was taken first.** You measured the task before AI so you can show the difference after. (0) (1) (2)

10 ☐ **Tools are on business plans with admin controls.** Not personal accounts. You can manage access and data settings centrally. (0) (1) (2)

SECTION B SUBTOTAL / 10

SECTION C TRAINING GAPS

5 CHECKS · 10 PTS

11 ☐ **Everyone is trained on the policy.** Not just sent it. They can explain the data rules in their own words. (0) (1) (2)

12 ☐ **Role specific training exists.** People are shown how to use AI for the priority tasks in their own job, with real examples. (0) (1) (2)

13 ☐ **Managers can review AI assisted work.** They know what good looks like and what errors to look for. (0) (1) (2)

14 ☐ **Champions are named.** One go to person per team helps peers and collects what works. (0) (1) (2)

15 ☐ **There is a place to share wins and problems.** A channel or short regular meeting where people swap prompts, results and mistakes. (0) (1) (2)

SECTION C SUBTOTAL / 10

TOTAL	MAX	YOUR SCORE
A + B + C	30	

INTERPRETATION AND ROLLOUT

YOUR BAND AND FIRST 30 DAYS

0 to 10
UNMANAGED

Use without guardrails
Start with Week 1 below before anything else. Policy and data rules come first.

11 to 20
EXPERIMENTING

Pockets of value
Pick use cases and write the workflows. Training without workflows fades fast.

21 to 26
READY TO SCALE

Foundations in place
Expand to the next team and measure against your baselines.

27 to 30
EMBEDDED

Part of how work runs
Review quarterly. Retire use cases that stopped paying off.

WEEK 1 GUARDRAILS

- [ ] Survey teams on current AI use.
- [ ] Publish a one page policy with data rules.
- [ ] Name the AI owner and team champions.

WEEK 2 FOCUS

- [ ] Choose two use cases tied to a measure.
- [ ] Record the baseline for each.
- [ ] Pick a pilot group of five to ten people.

WEEK 3 TRAIN

- [ ] Write the workflow SOP for each use case.
- [ ] Run hands on training with real tasks.
- [ ] Brief managers on reviewing the output.

WEEK 4 MEASURE

- [ ] Compare results to the baseline.
- [ ] Collect what worked and what did not.
- [ ] Decide: expand, adjust or stop each use case.

NEXT STEPS

WHAT TO DO WITH YOUR *results*

Low scores here are normal. Most teams adopted AI from the bottom up, so policy and training are catching up. The fix is a short, planned rollout, not a bigger tool budget.

01 **Close the policy gaps this week**
Section A is the cheapest to fix and protects you most. A one page policy is enough to start.

02 **Treat AI use cases like any other process change**
Each one needs a workflow, an owner, a baseline and training. Without those, usage drifts back to old habits.

03 **Run the 30 day plan with one pilot group**
Prove it on two use cases before rolling out company wide.

04 **Rescore after 30 days**
Use this same check. A move of five or more points means the rollout is working.

FREE CALL

BOOK A DISCOVERY SESSION

BRING YOUR RESULTS TO A DISCOVERY SESSION.

We will walk through your scores together, name the two or three fixes that matter most, and tell you plainly whether you need outside help or can run the fix in house.

BOOK ONLINE
bevelandsloane.com/contact

EMAIL US
info@bevelandsloane.com

Bevel & Sloane
Operations and L&D advisory, Chicago, Illinois
Founder led by a Former Learning Operations Specialist at Uber

bevel & sloane

Uber is a trademark of Uber Technologies, Inc. Bevel & Sloane is not affiliated with or endorsed by Uber. Statistics cited in this document are attributed to their original publishers with the year of publication. This worksheet is general guidance, not legal, HR or financial advice. © 2026 Bevel & Sloane LLC, Chicago, Illinois.