



AI Readiness Curriculum Guide

A facilitator's path for building a shared, evidence-led view of the conditions that make a useful first AI move possible.

WORKS WITH THE ASSISTANTS TEAMS ALREADY USE



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55

AT A GLANCE

A facilitator's path for building a shared, evidence-led view of the conditions that make a useful first AI move possible.

This guide explains how to run the Halden & Company AI Readiness learning path through four stages: See, Name, Strengthen and Review. Readiness here is not a score. It is a shared view of people, workflows, information and governance that lets a team choose a safe first move. For each stage the guide gives goals, a timed session plan, outputs, facilitation notes, prework, sticking points and signs of success. It also covers role tracks, written exercises, assessment of learning, a six-week cadence and how to keep the baseline current.

WHO IT IS FOR

Cross-functional teams across leadership, operations, people, technology and risk who will run a readiness baseline, and the facilitators who guide them.

TIME TO USE

50 minutes to read; six weeks to run

What you will have at the end

- A clear view of who should be in the room and what must exist before starting
- Timed plans for the four stages with outputs a facilitator can check
- Exercises written so a trained internal facilitator can run them
- Ways to measure learning beyond attendance
- A routine that keeps the baseline living instead of filed

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PROGRAM OVERVIEW

Who the readiness path is for and what it assumes

01



Readiness work succeeds when it produces a shared view and a first move, not a number to defend.

The AI Readiness curriculum starts from a plain observation: organizations ask people to change how they work before they understand the conditions around that work. The path uses interviews, working sessions, a self-assessment and an evidence-led baseline. It spans five lenses, which this guide groups into four stages: purpose and people (See), workflows and governance conditions (Name), the smallest useful changes (Strengthen), and a living baseline (Review).



Who it is for

- Leadership, operations, people, technology and risk leads who share responsibility for how AI enters the business
- Teams where informal AI use already exists and nobody has a shared picture of it
- Organizations preparing a larger implementation that want to know which conditions must be dependable first
- Sponsors who need a defensible reason for what begins now and what waits



Prerequisites

You need a sponsor who will accept findings that are uncomfortable, a working group of six to ten people from at least four functions, and permission to ask staff how they currently use AI without penalty. Nothing technical is required. If the group expects a pass or fail grade, reset the expectation in the first session: the output is a prioritized plan, and a weak area is a finding not a failure.

STARTING POINT	WHAT TO EMPHASIZE	WATCH FOR
Starting from zero	Safe language, visible boundaries, realistic first move	Rushing to platform decisions
Already experimenting	Linking informal use to workflow, review and accountability	Treating disclosed use as misconduct



STARTING POINT	WHAT TO EMPHASIZE	WATCH FOR
Preparing to scale	Operating conditions that must be dependable before wider rollout	Assuming pilot conditions will hold at scale

NOT LEGAL ADVICE

Readiness work touches privacy, employment and contract obligations. Treat outputs as working material and align them with qualified counsel and current law.

WORKING QUESTION

Which function is not yet represented in your readiness group, and what would they notice that the others will not?

STAGE 1: SEE

Purpose, priorities and people

02

Understand current use, confidence, priorities and concerns before judging any gap.

Goals

- Write the shared readiness question: ready for what, for whom
- Surface existing AI use, formal and informal, without blame
- Understand confidence and capability by role, and what support managers can offer
- Agree the outcomes and teams that matter most for the first phase

Session plan (two sessions, 90 minutes each)

TIME	ACTIVITY	OUTPUT
S1 0-20	Sponsor frames the purpose; group agrees what readiness means here	Readiness question
S1 20-60	Priorities round: which outcomes and teams matter in the next year	Priority list
S1 60-90	Plan the self-assessment and interviews; agree the no-blame rule	Fieldwork plan
S2 0-30	Share interview and survey themes about current use and confidence	Theme list
S2 30-65	Map capability by role: needs, confidence, manager support	Capability view
S2 65-90	Name what surprised the group	Surprises log

Working outputs

- A shared readiness question
- A priority list of outcomes and teams
- A people and capability view by role
- A first inventory of current AI use

Facilitation notes

The no-blame rule is the most important setup move. People will not describe unapproved tool use if they expect discipline. State in writing that the purpose is to understand use, and say what will happen to the information. Use anonymous responses where trust is thin. Keep the language plain: say writing assistant, not generative model, and ask what people do on a typical Tuesday.

Prework

- Short anonymous survey on current use, confidence and concerns, written in plain language
- Five to eight fifteen-minute interviews across levels and functions
- Collect any existing policies on data, acceptable use and procurement

Common sticking points

- Survey response is low. Have managers allocate ten minutes in a team meeting
- Leaders assume confidence is higher than it is. Show verbatim comments
- The question is vague. Add a team and an outcome to it
- Concern is treated as resistance. Ask what the concern protects

How to tell it landed

- People disclosed informal use in interviews or the survey
- The group can name two teams and two outcomes for phase one
- Capability is described by role, not as one organization-wide number
- The sponsor changed at least one assumption

WORKING QUESTION

If employees answered honestly, what would you learn about AI use today that you do not already know?

STAGE 2: NAME

Workflows, information and governance

03

Make constraints and enabling conditions explicit across process, information and decision-making.

Goals

- Map the workflows where AI would first touch the work: steps, handoffs, quality expectations
- Classify the information those workflows use and who may access it
- Make responsibilities, review points and escalation routes visible
- List constraints and enablers in plain sentences

Session plan (two sessions, 100 minutes each)

TIME	ACTIVITY	OUTPUT
S1 0-40	Map two or three priority workflows with the people who run them	Workflow maps
S1 40-70	Tag each step with the information used and how it is stored	Information tags

TIME	ACTIVITY	OUTPUT
S1 70-100	Mark where quality is checked today and by whom	Quality points
S2 0-35	Walk the governance questions: Responsibility grid who approves, who reviews, who is told	
S2 35-75	Write constraints and enablers for people, information, process and decisions	Constraint list
S2 75-100	Rank the constraints that would block a contained trial	Blockers



Working outputs

- A workflow and information baseline
- A responsibility grid covering approval, review and escalation
- A responsible-use starter guide, in draft
- A constraints and enablers list



Facilitation notes

Use a simple sensitivity scale agreed with counsel or a risk lead, for example public, internal, confidential and restricted. Ask each team to tag one real document per tier. Governance conversations drift into policy writing, so hold the line: the goal is to see who does what today, including gaps, not to draft a final policy. Gaps are findings.



Pework

- Each workflow owner brings three recent real examples, anonymized where required
- Risk or legal lead supplies existing information classification, if any
- IT lists approved tools and any known unapproved use

Common sticking points

- Information is described as everything. Insist on tagging examples
- Responsibility is shared by committee. Ask for one name per decision
- Teams cannot tell what is confidential. That is the finding, record it
- Governance sounds like control. Frame it as clarity about who decides



How to tell it landed

- Each priority workflow has information tiers attached to its steps

- At least three gaps in responsibility were named aloud
- Risk and operations staff used the same words for the same things
- The draft starter guide fits on two pages

WORKING QUESTION

For your highest-priority workflow, who can say yes to using customer information in an AI tool, and do they know it?

STAGE 3: STRENGTHEN

Priorities and the first move

04

Choose the smallest changes that make a contained experiment safer and more useful.

Goals

- Sort findings into begin now, strengthen first and wait
- Select the smallest strengthening actions with named owners
- Define a contained first experiment and its boundaries
- Decide how the organization will learn from it

Session plan (150 minutes)

TIME	ACTIVITY	OUTPUT
0-20	Review findings from Stages 1 and 2 in one page	Findings summary
20-60	Sort each finding by effort and by importance to the first move	Sorted findings
60-90	Write the smallest action for each strengthening item	Action list

TIME	ACTIVITY	OUTPUT
90-120	Draft the contained first experiment, who, what work, what information, what review	Experiment outline
120-140	Test the outline against the constraint list	Revised outline
140-150	Assign owners and dates	Commitments

Working outputs

- A prioritized readiness plan
- A one-page outline of the first contained experiment
- Owners and dates for each strengthening action
- A statement of what will wait and why

Facilitation notes

The temptation is a comprehensive remediation plan. Resist it. Ask for the smallest change that makes the first experiment safer, such as a two-line rule on customer data or a named reviewer. Say clearly which items wait. Naming what waits is a form of respect for the team's capacity and it protects the sponsor from the claim that nothing is being done.

Pework

- Facilitator drafts a one-page findings summary and circulates it two days ahead
- Owners check capacity for any actions they might take
- Sponsor confirms the budget boundary for the first phase, even if it is zero

Common sticking points

- Everything is labeled important. Force a maximum of five items in begin now
- Actions are policies that need months. Break into a first version in two weeks
- The experiment is too ambitious. Reduce users or scope until review is realistic
- Owners are senior and busy. Pair them with a doer

How to tell it landed

- The plan fits on one page
- Each action has an owner who agreed in the room
- The experiment outline names the person who reviews outputs
- The group can explain why at least one popular idea waits

WORKING QUESTION

What is the one change that would make your first experiment meaningfully safer, and could it be finished in two weeks?

STAGE 4: REVIEW

A living baseline

05

Create a baseline that can be revisited as capability and implementation grow.

Goals

- Turn the findings into a short baseline document with dates and owners
- Set review points: what to recheck, how often and who decides
- Define signals that show conditions improving or slipping
- Hand over facilitation to internal owners

Session plan (120 minutes)

TIME	ACTIVITY	OUTPUT
0-20	Read the baseline aloud; each function corrects errors in its section	Corrected baseline
20-50	Choose indicators for each lens, with a simple way to check them	Indicator list
50-80	Set review dates and triggers, such as a new tool request or an incident	Review schedule
80-105	Plan the first experiment's learning loop	Learning loop
105-120	Assign baseline ownership and agree communications to staff	Owner and message

Working outputs

- The readiness baseline, with a date and owner
- A people and capability view ready for updates
- A workflow and information map
- A responsible-use starter guide in its first version
- A review schedule with triggers



Facilitation notes

Close with communication. Staff who took part in interviews should hear what was found and what will happen next, in plain language and within two weeks. Silence after a survey damages trust for the next one. Make clear that the baseline is a working document and that anyone can propose a change to it.

Pework

- Draft the baseline from the stage outputs
- Choose a communication channel and a date
- Agree which leader will own the baseline



Common sticking points

- The baseline becomes a report on a shelf. Put the review date on the cover
- Indicators are too many. Choose one or two per lens
- Ownership is given to a committee. Name a person
- Staff communication is delayed until the plan is perfect. Send an interim note



How to tell it landed

- A person, not a team, owns the baseline
- Review dates are in calendars
- Staff received a summary and a way to respond
- The group used the baseline to answer a real request in the room

WORKING QUESTION

What event, short of a scheduled date, should make you reopen the baseline?



ROLE-BASED TRACKS

Executives, managers and practitioners

06

Readiness depends on all three groups, and each needs a different part of the path.

ROLE	ATTENDS	CONTRIBUTION
Executives	Stage 1 sessions, Stage 3 and Stage 4	Set the question, accept findings, own the plan
Managers	Stages 1 to 3 working sessions	Describe workflows, support team surveys, commit capacity
Practitioners	Interviews and a Stage 2 workflow review	Say how work really happens and how AI is already used
Risk and legal	Stage 2 and Stage 3	Advise on information tiers, constraints and escalation

Executive track

Executives often hold the least visibility into informal use. Their prework is to read ten verbatim comments from the survey. Their task in Stage 3 is to choose what waits. Their risk is a request to speed up before the baseline exists, which should be met with a date for the first-move decision rather than an exemption.

Manager track

Managers are the pivot for confidence and for workflow detail. Equip them with a short guide on how to hold a no-blame conversation about current use, and ask them to report themes, not names. Their stretch task is to name one workflow in their area where a mistake would matter most.

Practitioner track

Practitioners provide the evidence. Give them a safe channel, a short survey and a clear promise about feedback. Offer a voluntary one-hour workflow review in Stage 2. Ask what would make them trust a first experiment and what would make them quietly avoid it.

WORKING QUESTION

Who in your organization uses AI most fluently today, and have you asked them what they wish leaders understood?

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EXERCISES

Four exercises written for the facilitator

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Each exercise lists the steps, materials and output so a trained internal facilitator can lead it.

Exercise 1: Readiness question statement (Stage 1, 40 minutes)

01 Complete the sentence

Each person writes: We are ready enough to try AI in ____ when ____ is true.

02 Compare

Post sentences. Underline conditions that appear more than once.

03 Merge

Agree one sentence naming one area and three conditions.

04 Check

Ask the sponsor whether they would accept this as the test. Revise until yes.



Exercise 2: Typical Tuesday interview (Stage 1, 15 minutes each)

01 Open

Say the purpose and the no-blame rule. Ask permission to take notes.

02 Walk the day

Ask the person to describe a typical Tuesday and where AI tools come in, if at all.

03 Probe information

Ask what kinds of information they paste or upload and where it came from.



04 Ask the wish

Ask what would make them more confident and what worries them. Record verbatim.

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Exercise 3: Information tiering (Stage 2, 45 minutes)

01 Choose

Each team brings five real documents or data types, anonymized.

02 Tier

Place each on the agreed scale: public, internal, confidential, restricted.

03 Compare

Teams swap and challenge. Record disagreements.

04 Decide

For each tier, write whether AI tools are approved, need approval or are not allowed. Mark unclear cases for counsel.



Exercise 4: Begin, strengthen, wait (Stage 3, 40 minutes)

01 List

Write each finding on a card.

02 Sort

Place cards in three columns: begin now, strengthen first, wait.

03 Limit

No more than five cards in begin now. Move extras.

04 Own

Attach an owner and a date to every card outside wait.



ILLUSTRATIVE EXAMPLE

A finding such as sales staff paste prospect notes into a public chat tool might be sorted to strengthen first, with the smallest action being a two-line rule and an approved alternative within two weeks.



WORKING QUESTION

Which exercise would you most want to run first if you had only one hour with your team?



ASSESSMENT OF LEARNING

Measuring what changed beyond attendance

08



Readiness learning has landed when people share vocabulary, visibility and a first move, not when they complete a survey.

Attendance and survey completion confirm activity. Look instead at four things: shared language, visibility, ownership and action. Capture a small baseline at the start and compare at the end and at 90 days. Do not present estimates as measurements, and do not publish individual results.

LAYER	WHAT TO MEASURE	HOW
Shared language	Do functions describe information	Ask three people from different tiers and review the same way functions to define each term
Visibility	Share of priority workflows with a	Count maps against the priority list current map and information tags
Ownership	Gaps in responsibility with a name	Review the responsibility grid owner
Action	Strengthening actions completed	Track dates in the plan time; first experiment started



Signals worth watching

- Staff volunteer informal use because they trust the process
- Managers ask for the approved list before trying something new
- Risk and operations reference the same baseline



- Requests for new tools arrive with a workflow and an information tier attached
- The baseline is edited, not merely read



AVOID A SINGLE SCORE

A composite readiness number hides the conditions that matter and invites argument about weights. Keep the lenses separate and describe each in a sentence.



WORKING QUESTION

What evidence would convince a skeptical board member that your team understands its own readiness?



SAMPLE CADENCE

A six-week schedule

09

Six weeks gives time for fieldwork and for the first strengthening actions to begin.



WEEK	SESSION OR TASK	WHO
1	Kickoff, survey launch, interviews	Sponsor, working group begin
2	Stage 1 sessions; theme review	Working group
3	Stage 2 workflow and information session	Working group, workflow owners
4	Stage 2 governance session; counsel review of tiers	Working group, risk lead
5	Stage 3 priorities and first move	Working group, executives

WEEK	SESSION OR TASK	WHO
6	Stage 4 baseline review; staff communication	Working group, executives, owners

Running the cadence

- Close the survey by week 2 so themes arrive before the sessions
- Hold interviews in weeks 1 and 2 only, to keep the evidence fresh
- Circulate each session's one-page summary within 24 hours
- Keep a running list of questions for counsel and send it weekly
- Send the staff summary within two weeks of the final session

If your business has seasonal peaks, schedule the fieldwork away from them. A readiness baseline built in a crisis month will describe the crisis, not the normal conditions.

WORKING QUESTION

Which two weeks of the next quarter are the quietest for the people you need, and can you start then?

SUSTAINING THE WORK

Keeping the baseline current

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A baseline is useful while it reflects the business as it is.

01 Quarterly check

The owner reviews each lens with one or two indicators and updates the document.

02 Trigger reviews

Reopen the baseline when a new tool is requested, an incident occurs, a regulation changes or a major workflow changes.

03 Yearly refresh

Repeat a lighter survey and two interviews per function. Compare with the prior year.

04 Feed forward

Use the baseline as an input to strategy, training and implementation work.

Sustainment checklist

- A named baseline owner and backup
- Dates for the next four reviews
- A route for staff to flag a change
- A record of what was strengthened and when
- A link from every new tool request to the baseline

Halden & Company offers free assessments at halden.company/assessments as a quick starting check, and you can contact the team at halden.company/contact to discuss support.

WORKING QUESTION

What would have to happen for your baseline to be out of date in six months without anyone noticing?

30 / 60 / 90

A first quarter that produces evidence

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In 90 days you can have a visible baseline, a small set of strengthening actions and one contained first experiment.

First 30 days: ground it

- Name a sponsor and a working group from at least four functions
- Launch the anonymous survey and schedule interviews
- Agree the no-blame rule in writing
- Collect existing policies and approved tool lists



Days 31 to 60: test it

- Complete workflow and information maps for priority workflows
- Agree information tiers with counsel or a risk lead
- Fill the responsibility grid and name owners for gaps
- Draft the responsible-use starter guide

Days 61 to 90: decide

- Complete the strengthening actions in the begin-now column
- Start one contained experiment with a named reviewer
- Send staff a summary of findings and next steps
- Hold the first quarterly baseline review



GLOSSARY

Terms used in this publication

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TERM	MEANING
Readiness baseline	A shared, dated view of people, workflow, information and governance conditions.
Lens	One angle on readiness, such as people, workflows, information or governance.
Contained experiment	A small trial with a defined user, work, information and reviewer.
Information tier	A sensitivity level, such as public or confidential, that sets how information may be used.
No-blame rule	A stated promise that disclosing current use will not lead to discipline.



TERM	MEANING
Responsibility grid	A table showing who approves, reviews and is told for each type of decision.
Constraint	A condition that limits what can safely or usefully be done.
Enabler	A condition that makes a good first move easier.
Trigger review	A review prompted by an event instead of a calendar date.
Starter guide	A short first version of responsible-use rules to be improved with experience.

A note on use

This guide is an educational resource, not legal, technical or financial advice. Adapt it to your organization and confirm legal and regulatory points with qualified advisers.

TAKE THE NEXT STEP

Take the free Halden assessment at halden.company/assessments, or talk to us at halden.company/contact about turning this into a plan for your organization.