

AI Readiness Survey Kit

1. For the leader

This kit shows you how your team uses AI today, how safely, and where training would help most. It costs each person about 10 minutes and takes two weeks from start to briefing.

Why run it. Your people are probably using AI already, some of it on personal accounts or in tools nobody approved. You can't plan policy, tools or training without knowing where they stand. The survey replaces guesses with numbers.

Who to send it to. Everyone who does knowledge work, managers included, not only the people you think use AI. For results by team, send each team of 10 or more its own link. Don't add a team, role or location question.

How long it takes. About 10 minutes per person. Leave it open for 7 to 10 days and send one reminder.

Keep it anonymous.

- Never collect names, email addresses, employee IDs or anything else that identifies someone.
- Turn off any form setting that records who answered. Submit a test response and check the results show no name or email.
- Don't add open-text questions. Written answers can identify people, so the survey has none.
- Don't report results for any group smaller than 10.
- The form tells staff their answers about unapproved tools won't be traced to anyone. Keep that promise. If you can't, don't send it.

How to send it.

1. Copy the ready-made form in one click at bootcamp.stormwindstudios.com/resources/ai-readiness-survey. Every question is already in place.
2. Keep the wording as written, so the scoring sheet can read it. Building your own? Use section 2.
3. Send the link from a senior leader, not from security, with one line on why: "We're planning AI tools and training, and we want your honest view. It's anonymous and takes 10 minutes."

What to do with the results.

1. Export the responses and paste the whole export into cell A1 of the Responses sheet in AI-Readiness-Scoring-Sheet.xlsx. It does all the scoring. To see what you get first, open AI-Readiness-Scoring-Sheet-Example.xlsx.
2. Ask IT to work through the checklist in section 5 in the same two weeks.
3. Fill in the yellow cells on the spreadsheet's Summary tab, then print it or save it as a PDF for your executive team. Section 4 shows the layout.
4. Within a month, tell staff what you found and what happens next.
5. Run the survey again after training, or in six months, to measure the change.

2. The staff survey

The survey has 19 questions in five short sections, every one multiple choice or a five-point agreement scale. The ready-made form already holds all of it. If you build your own, paste the text below into your form as written.

Form title: AI at work: a 10-minute anonymous survey

Form description: This survey takes about 10 minutes. It's anonymous: it doesn't ask for your name, email or team, and nobody can see who gave which answer. There are no right or wrong answers. Many people already use AI tools in their own way, approved or not, and that's useful for us to know. Answers about unapproved tools won't be traced to anyone or used against anyone. By "AI tool" we mean any chat app, AI feature in software you already use, browser extension or meeting note-taker. We'll use the results to plan AI tools, guidance and training.

Agreement scale (questions marked *Agree*): Strongly disagree · Disagree · Neutral · Agree · Strongly agree. Use a choice question with these five options, or your form's rating or grid question.

Section A: How you use AI today

Q1. In a typical week, how often do you use an AI tool for work? *Choice*

- Never
- Less than once a week
- One to three days a week
- Most days
- Several times a day

Q2. What do you use AI tools for at work? Select all that apply. *Choice, multiple answers*

- Drafting or editing emails and documents
- Summarizing documents, threads or meetings
- Research, or explaining something unfamiliar
- Working with data or spreadsheets
- Writing or reviewing code or scripts
- Brainstorming or planning
- Something else
- I don't use AI tools for work

Q3. Which account do you usually use for AI at work? *Choice*

- An account our organization provides
- My own personal account (free or paid)
- Both, depending on the task
- I'm not sure
- I don't use AI tools for work

Q4. Many people try AI tools before anything is officially approved. In the last three months, how often have you used an AI tool for work that you weren't sure was approved? *Choice*

- Never
- Once or twice
- A few times a month
- Weekly or more
- Prefer not to say

Q5. When you use a personal or free AI account, how often does work content go into it, such as emails, documents or data? *Choice*

- I don't use a personal or free account for work
- Rarely
- Sometimes
- Often
- Prefer not to say

Section B: How you feel about AI at work

Q6. I feel comfortable using AI tools in my work. *Agree*

Q7. AI tools could save me real time on parts of my job. *Agree*

Q8. I have concerns about how AI will change my role. *Agree*

Q9. I'd feel comfortable telling my manager how I use AI at work. *Agree*

Section C: Using AI well

Q10. I know how to ask an AI tool for something so the answer is useful within one or two tries. *Agree*

Q11. Before I ask, I give the AI tool background on my role and the task. *Agree*

Q12. An AI tool gives you a confident answer that includes a statistic you need for a report. What would you do? *Choice*

- Use it as given
- Ask the AI tool whether it's sure, then use it
- Leave the statistic out
- Check it against a reliable source before using it
- I'm not sure

Q13. I could list the kinds of information that must never go into an AI tool. *Agree*

Q14. You want an AI tool's help replying to a customer complaint. Which approach is safest? *Choice*

- Paste the whole email thread so the AI tool has full context
- Paste the email with the customer's name removed
- Describe the situation, using placeholders such as "Customer A" for names and account numbers
- I'm not sure

Section D: Rules and approved tools

Q15. Does our organization have a policy or guidance on using AI tools at work? *Choice*

- Yes, and I've read it
- Yes, but I haven't read it
- I think so, but I'm not sure
- I don't think so

Q16. I know which AI tools I'm allowed to use for work. *Agree*

Q17. I know who to ask when I'm not sure whether I can use an AI tool, or share certain information with it. *Agree*

Section E: What would help

Q18. Which of these would help you most? Choose up to three. *Choice, multiple answers*

- Clear guidance on what's allowed and what information can go in
- An approved AI tool with a work account
- Hands-on training using my own work tasks
- Ready-made prompts and templates for common tasks
- Help setting up an AI agent for my role
- Examples from people in jobs like mine
- Time set aside to practice
- I don't need help right now

Q19. How would you most like to learn? *Choice*

- Live sessions with an instructor
- Short self-paced guides
- A mix of live sessions and guides
- Learning from colleagues

3. Scoring guide

The included spreadsheet, AI-Readiness-Scoring-Sheet.xlsx, does all of this automatically: paste in your form's export and read the results. If you can't use it, score by hand with the steps below.

Score five dimensions from 1 to 5, then place each in one of three bands. You need at least 10 responses before you score.

1. Export the responses to a spreadsheet.
2. Turn each scored answer into points with the table below. Agreement answers score Strongly disagree 1, Disagree 2, Neutral 3, Agree 4, Strongly agree 5.
3. Leave "Prefer not to say" out of the averages, but count it. If more than 1 in 5 people chose it, trust is low, and that is a finding.
4. For each dimension, average the points of its questions across all responses.
5. Round each average to one decimal place and find its band.

Dimension	Questions	Points per answer
Use	Q1, Q2	Q1: Never 1, Less than weekly 2, One to three days 3, Most days 4, Several times a day 5. Q2: count the uses ticked: none 1, one 2, two 3, three 4, four or more 5.
Skills	Q10, Q11, Q12	Q10, Q11: agreement. Q12: Check against a reliable source 5, Leave it out 3, Ask the AI tool 2, Use as given 1, Not sure 1.
Safety and data handling	Q5, Q13, Q14	Q5: Don't use a personal or free account for work 5, Rarely 3, Sometimes 2, Often 1. Q13: agreement. Q14: Placeholders 5, Name removed 2, Whole thread 1, Not sure 1.
Policy awareness	Q15, Q16, Q17	Q15: Read it 5, Haven't read it 3, Not sure 2, Don't think so 1. Q16, Q17: agreement.
Confidence	Q6, Q7, Q9	Agreement.

If your organization has no written AI policy, drop Q15 from the score and report the missing policy as a gap of its own. Q3, Q4, Q8, Q18 and Q19 aren't scored. Use them as described below and in section 4.

Bands

Band	Average	What it means
Early	1.0 to 2.4	Few people use AI for work, or they use it without the skills, rules or confidence to do it safely.
Developing	2.5 to 3.7	People use AI, but unevenly. Good habits sit beside real gaps. Most teams land here.
Ready	3.8 to 5.0	People use approved tools often, check what they get, and know the rules. The next step is scale.

Shadow AI

Report three percentages of all responses beside the scores:

- **Personal accounts:** people who answered "My own personal account" or "Both" to Q3.
- **Tools not known to be approved:** people who answered anything but "Never" or "Prefer not to say" to Q4.
- **Work content in personal or free tools:** people who answered Rarely, Sometimes or Often to Q5.

If any of the three is above 25 percent, make shadow AI a priority and compare it with IT's findings from section 5. Many "I'm not sure" answers to Q3 point to a policy gap, not bad intent.

Read the pattern

- **High Use, low Safety or Policy:** people are moving faster than the rules. This is the biggest risk, so fix it first.
- **Low Use, high Confidence:** people are willing but lack an approved tool or permission. That is an access gap.
- **Low Use, low Confidence:** an awareness and skills gap. Start with hands-on basics.
- **High Confidence, low Skills:** people trust output they haven't checked. Teach checking first.

4. Results summary template

The spreadsheet's Summary tab fills in this page for you. Add the parts in yellow there, then send it to your executive team. If you score by hand, fill in the brackets below. Keep it to one page.

AI readiness: [Organization or team]

Survey open [start date] to [end date] • Sent to [number] people • [number] responses ([percent] response rate)

The gap in one sentence: [For example: "Most of us use AI every week, but fewer than half know what must stay out of it."]

Dimension	Score (1 to 5)	Band	What it means for us
Use	[]	[]	[]
Skills	[]	[]	[]
Safety and data handling	[]	[]	[]
Policy awareness	[]	[]	[]
Confidence	[]	[]	[]

Shadow AI

- [number] percent use a personal account for AI at work (Q3).
- [number] percent used a tool they weren't sure was approved in the last three months (Q4).
- [number] percent put work content into personal or free tools (Q5).
- IT checklist findings: [two or three lines from section 5]

How people feel

- [number] percent agree or strongly agree AI could save them real time (Q7).
- [number] percent agree or strongly agree they have concerns about how AI will change their role (Q8).

What staff asked for (Q18, top three): [1] • [2] • [3]

How they want to learn (Q19): [most common answer]

Recommended next steps

Step	Owner	By when
[]	[]	[]
[]	[]	[]
[]	[]	[]

Decision needed: [For example: approve an AI policy, an approved tool, or a training plan.]

5. IT-side shadow AI checklist

The survey shows what people say. These ten checks show what your systems say. Run them in the same two weeks, and compare the two.

Look for patterns, not people. These checks size the problem and point to fixes. They are not a way to find out who answered what, and using them that way breaks the promise the survey makes. Admin screens differ by vendor and change often, so check each vendor's current documentation for where a setting lives.

- ☐ **AI features in tools you already license.** List the AI features in your productivity suite, email, chat, CRM, help desk and design tools. Note which are on, which arrived switched on in an update, and which are approved.
- ☐ **Browser extensions.** Inventory extensions on managed browsers. Look for AI writing, summarizing and "chat with this page" extensions, which can read whatever page is open.
- ☐ **Personal AI accounts used for work.** Look at aggregate traffic to AI services, if you already collect it and your policy allows. Compare it with your approved tool list.
- ☐ **AI note-takers in meetings.** Check for third-party bots joining calls, and for recordings or transcripts stored outside approved systems.
- ☐ **Third-party app access.** Review which apps people have authorized to reach work email, calendars and files. AI apps often ask for broad access.
- ☐ **Desktop and mobile apps.** Check your software inventory or device management for AI desktop apps, AI keyboards and AI mobile apps on managed devices.
- ☐ **Connections in approved AI tools.** List what data sources your approved tools are connected to, and who is allowed to add a connection.
- ☐ **Data loss prevention coverage.** Check whether your current data loss controls see text pasted or files uploaded to AI sites, and what they would catch.
- ☐ **Work accounts for approved tools.** Count who has one. People without a work account are the most likely to use a personal one. Compare with Q3.
- ☐ **Policy and a route for questions.** Confirm there is a current written AI policy, a published list of approved tools, and a named person or ticket route for "Can I use this?" Compare with Q15 to Q17.

6. What to do next, by band

Work on your lowest band first. If Safety and data handling or Policy awareness is Early, start there, whatever your Use score says.

Early

- Publish a short written AI policy, a list of approved tools, and a named person to ask.
- Give people a work account in one approved tool, so nobody needs a personal one.
- Share the list of what never goes into an AI tool, below.
- Run a short hands-on introduction for everyone, not only the keen.

Developing

- Close the Skills and Safety gaps with structured practice on people's own tasks, not demos.
- Build two habits: give the agent background before asking, and check its output before using it.
- Pair confident users with hesitant ones.
- Survey again after training to measure the change.

Ready

- Move from one-off chats to a set-up agent for each person: saved instructions about their role, reusable workflows, and approved connections to work data.
- Write down what works so teams can share it.
- Run the IT checklist every quarter. New AI features keep arriving in tools you already own.

What never goes into an AI tool

A starting list for your policy, taken from the data rules StormWind's AI Accelerator bootcamp teaches. Your organization's own policy is the one that counts.

- **Customer or personal details:** names, email addresses, phone numbers, home addresses or account numbers, colleagues' as well as customers'.
- **Regulated records:** health, financial, HR and legal records, unless IT has said in writing that the tool may see them.
- **Passwords, keys and access codes:** no credentials of any kind, and nothing that grants access to a system.
- **Anything under an NDA or not yet public:** unreleased plans, contracts, pricing and source code need clearance first.
- **Anything your policy prohibits.**

Connected apps. An email or file connection IT approved can read the names and addresses in what it opens. Everything else on this list still applies.

Instead, swap real details for placeholders such as "Customer A", describe the situation rather than pasting the document, and trim files before you upload them. When in doubt, leave it out.

Where training fits

Policy and access are the organization's job. Skills, safe data handling and confidence are where training closes the gap.

StormWind's AI Accelerator runs as six weekly live sessions. Each person builds a safe AI agent for their own work, in the tool your organization approves, and learns to use it well and keep data safe. Guides online support them between sessions.

The next cohort starts January 19, 2027. To enroll your team, go to bootcamp.stormwindstudios.com or book a call at bootcamp.stormwindstudios.com/book.