

FixicoAI Readiness Assessment

Choose one task.
Prepare a useful test.

Find the gaps, check the conditions
and plan a small AI trial.

Start with one decision

What would make one AI-supported task worth trying?

This workbook helps individuals and small teams identify preparation needs, compare possible tasks and plan one low-risk trial. You can complete it on paper without uploading anything to AI.

The scorecard is an unvalidated self-report planning aid. It is not a diagnostic test, a percentage of readiness, a certification or permission to deploy AI.

Your route

Pages	What you will do
3-11	Describe your starting point and score 35 preparation statements.
12-16	List tasks, screen risks, check prerequisites and compare eligible choices.
17-20	Plan a trial, write a prompt, check three cases and record total effort.
21-22	Record the decision and choose a practical next step.

Work at your own pace

Allow an initial planning session, then return when missing evidence is available. Completing the worksheet does not mean the trial or its checks are complete.

Use general descriptions here. Keep private records, credentials and confidential details out. Start practice with wholly fictional material. Removing names does not by itself establish that real data is safe to upload.

Two decisions stay separate

Your item scores help you decide what to learn or clarify. The workflow checks on pages 13-14 determine whether a particular task can be considered for a trial. A high score cannot cancel a failed or unknown prerequisite.

The Primer introduces prompting. The Jumpstart Guide develops a practice routine. Use this Assessment to decide where to apply those habits.

Your starting point

Keep descriptions general; no private records are needed.

Date and role or team (optional):

What work do you want to make easier? Name a recurring task and the people who use its output.

How do you do it now? Note the input, main steps and finished result.

What would improve? Choose a concrete outcome: fewer corrections, clearer writing, less total effort or a more consistent handoff.

Current experience: New / occasional practice / regular use. Describe one example if useful.

Known constraints: Allowed tools, data rules, review capacity, time or budget. Write Unknown when you need to check.

A. Awareness and expectations

Know what the output can and cannot establish.

Score every statement: **0** not true yet; **1** partly true; **2** mostly true; **3** documented or repeatable. Mark **U** if unknown. Count U as zero only for arithmetic; it is not evidence of inability.

Item	Statement	0-3 / U
A1	I understand that a useful-looking AI answer can still be wrong.	—
A2	I distinguish assistance with a draft from authority to make a final decision.	—
A3	I can name a small task where AI assistance might be useful.	—
A4	I recognize when a task needs qualified review or should stay manual.	—
A5	I can explain why I need to check the result before using it.	—

Subtotal: ___ / 15 Unknown answers: ___ / 5

Evidence or an example behind your ratings

One preparation step

Use the Primer to practice checking a short answer against supplied facts.

My action and the person who can help:

These ratings describe your current self-report. Check the actual workflow separately; the subtotal does not establish competence or permission.

B. Workflow clarity

Define the work before choosing a tool.

Score every statement: **0** not true yet; **1** partly true; **2** mostly true; **3** documented or repeatable. Mark **U** if unknown. Count U as zero only for arithmetic; it is not evidence of inability.

Item	Statement	0-3 / U
B1	I can name a recurring task with a clear beginning and end.	—
B2	I know what currently takes effort or causes errors in that task.	—
B3	I can describe the input, main steps and expected output.	—
B4	I can state observable checks for an acceptable result.	—
B5	I can explain who might be affected if the result is wrong.	—

Subtotal: __ / 15 Unknown answers: __ / 5

Evidence or an example behind your ratings

One preparation step

Map one task using page 17. Include the manual alternative.

My action and the person who can help:

These ratings describe your current self-report. Check the actual workflow separately; the subtotal does not establish competence or permission.

C. Data handling

Permission applies to the actual tool, task and input.

Score every statement: **0** not true yet; **1** partly true; **2** mostly true; **3** documented or repeatable. Mark **U** if unknown. Count U as zero only for arithmetic; it is not evidence of inability.

Item	Statement	0-3 / U
C1	I can identify information that must not enter an unapproved AI tool.	—
C2	I know that removing names may leave identifying or confidential details.	—
C3	I know where to confirm permission for this tool and type of data.	—
C4	I know which data-handling settings or terms need checking before use.	—
C5	I know whom to ask when permission or data suitability is unclear.	—

Subtotal: __ / 15 Unknown answers: __ / 5

Evidence or an example behind your ratings

One preparation step

Resolve unknowns with the responsible owner. Use fictional material for practice.

My action and the person who can help:

These ratings describe your current self-report. Check the actual workflow separately; the subtotal does not establish competence or permission.

D. Tool access and fit

Access to a tool is different from permission to use it for work.

Score every statement: **0** not true yet; **1** partly true; **2** mostly true; **3** documented or repeatable. Mark **U** if unknown. Count U as zero only for arithmetic; it is not evidence of inability.

Item	Statement	0-3 / U
D1	I can identify a tool suitable for my proposed practice task.	—
D2	I know whether it can read the input and produce the format I need.	—
D3	I can verify that its use is permitted for the actual task and data.	—
D4	I can check relevant account settings and limits before a real-work trial.	—
D5	I have a usable alternative if the tool is unavailable or unsuitable.	—

Subtotal: ___ / 15 Unknown answers: ___ / 5

Evidence or an example behind your ratings

One preparation step

Check the selected tool in the actual account and document the permitted scope.

My action and the person who can help:

These ratings describe your current self-report. Check the actual workflow separately; the subtotal does not establish competence or permission.

E. Prompting and communication

Give the task, useful context and an output you can check.

Score every statement: **0** not true yet; **1** partly true; **2** mostly true; **3** documented or repeatable. Mark **U** if unknown. Count U as zero only for arithmetic; it is not evidence of inability.

Item	Statement	0-3 / U
E1	I can state the task clearly; I add a role only when it helps.	—
E2	I can describe the objective and observable success criteria.	—
E3	I can supply relevant context without disclosing prohibited information.	—
E4	I can specify the intended audience and output format.	—
E5	I can request missing-information handling and then check that it was followed.	—

Subtotal: ___ / 15 Unknown answers: ___ / 5

Evidence or an example behind your ratings

One preparation step

Draft a short prompt on page 18. A seven-part checklist is optional, not a formula to fill mechanically.

My action and the person who can help:

These ratings describe your current self-report. Check the actual workflow separately; the subtotal does not establish competence or permission.

F. Review and quality

A confident answer is not evidence that it is correct.

Score every statement: **0** not true yet; **1** partly true; **2** mostly true; **3** documented or repeatable. Mark **U** if unknown. Count U as zero only for arithmetic; it is not evidence of inability.

Item	Statement	0-3 / U
F1	I can compare important claims against an appropriate source.	—
F2	I know which checks must pass before the output is used.	—
F3	I can check names, dates, numbers and citations instead of trusting their appearance.	—
F4	I can recognize when missing source access prevents verification.	—
F5	I can reject a result and use the manual method when checking or repair is impractical.	—

Subtotal: ___ / 15 Unknown answers: ___ / 5

Evidence or an example behind your ratings

One preparation step

Write concrete acceptance checks before testing. Another AI critique is not independent verification.

My action and the person who can help:

These ratings describe your current self-report. Check the actual workflow separately; the subtotal does not establish competence or permission.

G. Ownership and shared rules

For solo work, use I; for a team, agree who is responsible.

Score every statement: **0** not true yet; **1** partly true; **2** mostly true; **3** documented or repeatable. Mark **U** if unknown. Count U as zero only for arithmetic; it is not evidence of inability.

Item	Statement	0-3 / U
G1	I or my team have recorded acceptable and unacceptable AI uses.	—
G2	I or my team have a clear rule for allowed tools and data.	—
G3	I or my team know who decides whether a workflow may be tried.	—
G4	I or my team keep useful prompts, test results and lessons in an accessible place.	—
G5	I or my team know who can stop a trial and where to seek qualified help.	—

Subtotal: ___ / 15 Unknown answers: ___ / 5

Evidence or an example behind your ratings

One preparation step

Record one owner, reviewer and stop rule. A solo operator may fill both roles only if capable and authorized.

My action and the person who can help:

These ratings describe your current self-report. Check the actual workflow separately; the subtotal does not establish competence or permission.

Read your preparation scores

Use the items to choose an action, not a readiness label.

Category	Subtotal / 15	Unknown / 5
A. Awareness	—	—
B. Workflow clarity	—	—
C. Data handling	—	—
D. Tool access and fit	—	—
E. Prompting	—	—
F. Review and quality	—	—
G. Ownership and rules	—	—
Total	___ / 105	___ / 35

All 35 items remain in the total. Each category has five items worth at most three points: $7 \times 5 \times 3 = 105$. Record U separately and count it as zero in the sum. Do not omit an item or convert the total into a percentage of readiness.

What to do with the result

Resolve unknowns and low ratings that affect your chosen workflow first. Do not assume that the lowest category is always the most urgent: missing data permission or review capacity can block a task even when other ratings are high.

Priority item, evidence needed and next action:

Worked arithmetic: fictional Rowan

Rowan reports A=10, B=10, C=0, D=10, E=10, F=10 and G=5. Total: **55 / 105**. That identifies preparation work; it does not approve a pilot. If P2 on page 14 is Unknown, the real-work trial stays on hold.

Even 105 / 105 cannot override one failed or unknown prerequisite. This edition uses no readiness bands: the earlier cutoffs were editorial groupings, not validated thresholds.

Find candidate tasks

Describe three possibilities before choosing one.

Look for a small task whose output a capable person can check against a source: organizing non-sensitive notes, rewriting approved text or drafting a checklist from an existing process. The topic alone does not determine risk; inputs, use and consequences matter.

Candidate A

Task, input and output:

Frequency, current effort and desired improvement:

Candidate B

Task, input and output:

Frequency, current effort and desired improvement:

Candidate C

Task, input and output:

Frequency, current effort and desired improvement:

Use another copy for more candidates. Screen each on page 13, then complete a separate evidence page for each possible starter.

Screen the task before ranking

For this first trial, choose a low-risk task with checkable output.

Ask what could go wrong

Consider the input, errors, intended audience and actions that follow. A public document can still support a high-stakes decision; internal notes can still contain private information.

Screen	Meaning and next action
Low	Errors are easy for the named reviewer to detect before use, and the proposed use has limited consequences. Check every prerequisite on page 14.
More consequential	Errors could affect people, money, rights, health, safety, security or an important external decision. Set aside for this starter trial; obtain suitable specialist and organizational review.
Unknown	You cannot yet explain the consequences, information involved or review needed. Resolve the uncertainty before a real-work trial.

Examples depend on scope

- Reformatting a wholly fictional meeting list for practice has limited consequences.
- Rewriting an approved public notice can be considered only if someone checks every material fact before publication.
- Screening job applicants, deciding eligibility or sending automated customer responses is outside this beginner trial.

Record the screen

Candidate and proposed use:

Possible harm, affected people and review needed:

Result: Low / more consequential / Unknown. **Reason:**

Renaming a risky task as a draft or checklist does not make it eligible. If you change its scope, repeat the screen and all five prerequisites.

Check the workflow evidence

One copy per candidate. A total score cannot replace these checks.

Candidate / date / person completing this page: _____

Mark each **Pass / Fail / Unknown**. Pass means the evidence is in place for this exact task; an intention to arrange it later is not a Pass.

P1. Tool permission

Selected tool, allowed task/data and the permission source. **Result:** ____

P2. Suitable inputs

Data categories, permitted source and pre-upload check. **Result:** ____

P3. Capable review

Named reviewer, original source access and concrete checks. **Result:** ____

P4. Bounded scope

Owner, one task, intended users and excluded actions. **Result:** ____

P5. Stop and fallback

Stop triggers, person able to stop and manual alternative. **Result:** ____

Any Fail or Unknown means no real-work trial yet. Resolve the gap; fictional practice is an option only in a tool you are allowed to use. All five Pass plus a Low screen allows consideration, not automatic approval: the owner must agree to the scope.

Compare eligible choices

Rank only candidates with a Low screen and five Pass results.

Use **1 = weak fit, 2 = limited, 3 = moderate, 4 = strong, 5 = very strong**. These are subjective comparisons, not measured predictions. If you cannot justify a rating, obtain evidence before ranking that candidate.

Criterion	What to compare
Value	Likely benefit in effort, quality or consistency; identify the evidence.
Frequency	How often the task matters within your planned trial period.
Clarity	How precisely the input, output and acceptance checks are defined.
Reviewability	How practical the required checking is within available time.
Input suitability	How simple it is to prepare permitted, appropriate inputs.
Tool fit	How well the permitted tool supports the task and needed format.
Ease	How manageable a small trial is with available time and resources.

Eligible candidate names: A ___ B ___ C ___

Criterion	A	B	C
Value	—	—	—
Frequency	—	—	—
Clarity	—	—	—
Reviewability	—	—	—
Input suitability	—	—	—
Tool fit	—	—	—
Ease	—	—	—
Total / 35	—	—	—

Leave blocked candidates unranked. Resolve ties using simpler review and clearer evidence, or do a small fictional comparison first. Record the reason for your choice on page 17.

Worked choice: evidence first

A fictional example; these are teaching ratings, not measured results.

Rowan considers three tasks. For each eligible task, assume Rowan has documented the selected tool's permission, permitted inputs, a capable reviewer, a bounded scope and a manual fallback.

Candidate	Evidence and screen	Decision
A. Draft a notice from approved public event details	Reviewer can compare every detail with the approved source before publishing. Low; P1-P5 Pass.	Eligible to rank
B. Organize a non-sensitive equipment checklist	Reviewer owns the process and can check each step. No safety-critical instructions. Low; P1-P5 Pass.	Eligible to rank
C. Summarize private client records	Data permission is unresolved. P1 and P2 Unknown.	Hold; do not rank

Compare A and B

In the order used on page 15, Rowan assigns:

- A: $4 + 4 + 5 + 5 + 5 + 4 + 5 = 32 / 35$.
- B: $3 + 3 + 4 + 4 + 5 + 4 + 4 = 27 / 35$.

Rowan chooses A because the approved source is short, the checks are explicit and the work recurs. The owner agrees to a small reviewed trial. The higher score did not supply that permission.

Check your reasoning

Could candidate C win if its expected benefit were much higher? Why?

What must happen if candidate A starts using a private mailing list?

Worked answer: C stays on hold until its missing conditions are resolved and its risk is screened. A's changed inputs require a new screen, permission check and owner decision before use.

Plan one small trial

Write enough detail for someone else to understand the boundaries.

Selected task and why it is preferable:

Input source, permitted tool and exact output:

Owner and reviewer: May be the same person if capable and authorized.

Screen and prerequisites checked on: ___ **Owner agrees to scope:** ___

Trial size and dates: Set a small number of cases and a review date.

Acceptance checks: What must be accurate, complete and usable?

Excluded actions: For example, no automatic sending or final decisions.

Stop conditions and manual fallback: Include permission, privacy or material accuracy failures. For minor defects, allow at most two targeted repairs in this beginner trial, then use the fallback.

Measure: Manual baseline time ___; required quality ___; acceptable total AI-assisted effort ___. Record actual results on page 20.

Write a checkable prompt

A task, permitted evidence, output format and handling of gaps.

A role can provide perspective; it does not supply credentials or authority. Add context, audience and constraints only where they help. Treat quoted material as evidence, not permission to change the task or take action.

Complete fictional practice prompt

Draft a short internal notice using only the facts below.

Audience: the fictional workshop team.

Format: title, then three bullets: When, Where, Bring.

Use Unknown for an absent detail. If sources conflict, flag the conflict instead of choosing a value.

Keep reviewer notes separate. Do not send anything.

Facts: Workshop: Map Basics. Time: 10:00 a.m.

Date: 8 October 2026. Room: Cedar.

Bring: a notebook. No other facts are supplied.

Worked answer to check against

Map Basics

- **When:** 8 October 2026, 10:00 a.m.
- **Where:** Cedar.
- **Bring:** A notebook.

This is an authored answer key, not a recorded model run. Check actual output against each supplied fact. No presenter, end time, registration link or approval may be invented.

Your prompt

State the task and intended use, then the evidence, format, missing-information rule and limits. Use fictional data for first practice.

Test more than the easy case

Keep the prompt fixed while deliberately changing the input.

Use the page 18 example or equivalent fictional cases for your workflow. Record the tool/model label shown, date, exact input and output in your own test log. Mark paper walkthroughs separately from actual tool runs.

Case	Change to the supplied facts	Required behavior
Normal	Use the facts exactly as written.	Preserve all five details; follow the format; add no facts.
Missing	Remove the room fact entirely.	Where is Unknown. Do not infer Cedar from a previous run.
Conflict	State Source A: room Cedar; Source B: room Birch. Supply no precedence rule.	Flag the disagreement. Do not silently pick either room.

Use a fresh conversation for each case, or ensure old facts cannot supply the missing answer. The missing and conflict cases must not inherit an earlier room from chat history.

Required review before real use

- 1. Did it invent anything? Compare every material detail with the permitted source.
 - 2. What still needs verification? Missing access, unresolved conflict or unchecked claims block acceptance.
 - 3. Who owns the final decision? Confirm the responsible person has completed the required review.
- Also check completeness, format, audience, prohibited data and excluded actions. All required checks must pass; a good style score cannot offset a failed check.

Normal: Pass / Fail / Unknown **Missing:** Pass / Fail / Unknown

Conflict: Pass / Fail / Unknown **Reviewer / date:** ____

Defect, repair or next action:

Passing three practice cases is limited evidence, not a reliability guarantee. Repeat relevant checks on new outputs and after changes to the model/version, settings, application, prompt, data or task.

Record effort and decide

A useful draft must still justify its checking and repair cost.

Task / case / date / tool and model, if shown:

Record type: Actual run / paper walkthrough. Required checks: Pass / Fail / Unknown

Time in minutes	Record
Manual task with equivalent quality and checks	—
Input preparation	—
Generation / waiting that counts toward your chosen measure	—
Checking	—
Repair and rechecking	—
Total AI-assisted effort	—
Difference: manual minus total AI-assisted	—

Use the same basis for both methods: active effort or elapsed time. Record one-time setup separately. A negative difference means the assisted method took longer. Do not count a result as a saving while required checks remain unresolved.

Worked arithmetic: Manual 12 minutes; preparation 2 + generation 1 + checking 5 + repair 2 = 10. Difference: **2 minutes**. If checking plus repair instead takes 14, total is 17 and the difference is **-5 minutes**.

Quality compared with the manual result; remaining defects:

Decision: Keep testing / revise and retest / stop and use the fallback.

Reason, owner and next review date:

One good result does not establish a standard workflow. Look for repeated acceptable results and manageable review before the owner decides on continued use.

Your decision summary

Keep this locally or share a non-sensitive summary with a reviewer.

Preparation total: ___ / 105 **Unknown items:** ___ / 35

Priority preparation gap and next action:

Chosen task, input and intended output:

Risk screen: Low / more consequential / Unknown

P1: ___ **P2:** ___ **P3:** ___ **P4:** ___ **P5:** ___

Permission and evidence location (no secrets):

Owner / reviewer / scope decision / date:

Cases tested and results: Distinguish actual runs from plans.

Total effort and quality finding:

Next action, responsible person and due date:

Valid outcomes include preparation only, fictional practice, a bounded owner-approved trial, more testing, or staying manual. A score does not require buying a service or adopting AI.

Use the result

Clarity about the next action is the useful outcome.

Choose help by the actual gap

- **Basics or review need practice:** Return to the Primer or Jumpstart and check one short output.
- **Permission or inputs are unclear:** Resolve the questions with the responsible tool or data owner before real-work use.
- **Workflow is eligible but untested:** Complete the normal, missing and conflict cases, then decide whether a small trial is justified.
- **Repeated results are useful:** Document the scope, prompt, sources, reviewer, limits and review date. Continued use remains an owner decision.
- **Errors or review cost outweigh the benefit:** Stop, change the approach or keep the manual process.

If you want support, describe the gap and intended outcome. Confirm scope, availability and cost before engaging help. [FixicoAI resources and contact](#).

Facilitator notes

Have participants rate themselves before discussion. Ask for evidence without requesting sensitive records. Keep unknowns visible; do not use totals to compare people's competence. Complete the risk screen before ranking. If a task is reframed, repeat all prerequisites. End with an owner, action and date, including an explicit hold when necessary.

Sources and limits

Checked September 15, 2026. These references inform the general approach; neither validates this scorecard or endorses FixicoAI.

- [NIST AI Risk Management Framework](#): voluntary guidance for considering risks in AI design, use and evaluation.
- [OpenAI evaluation best practices](#): task-specific cases and human judgment help evaluate variable outputs. No particular evaluation product is required here.

This is educational planning material, not professional advice or a technical audit. Consequential uses need appropriate expertise and organizational review. Examples are fictional; no customer results, participant validation or model-performance guarantees are claimed.

Format: Printable worksheets and selectable text; no interactive form fields.