Is your practice ready for AI?

Twenty quick checks. Tick what's true today. It takes five minutes, and it shows where to start and what to fix before anyone puts client data into an AI tool.

1. Data and confidentiality

- [ ] We know which AI tools staff are using today, including free ones on phones
- [ ] Approved tools are on business plans that don't train on our inputs
- [ ] We've written down what client data must never go into AI
- [ ] Our privacy notice and engagement letters cover AI-assisted work
- [ ] Access is through work accounts we can switch off when someone leaves

2. Policy and supervision

- [ ] We have a written AI use policy (two pages is enough)
- [ ] A qualified person checks AI output before it reaches a client
- [ ] We know what to do if something goes wrong, and who to tell
- [ ] Our PI insurer's position on AI use has been checked
- [ ] One named person owns AI in the practice

3. Where the time goes

- [ ] We know our top five repetitive jobs and roughly how long each takes
- [ ] Chasing clients for records is mapped as a process, not left to memory
- [ ] Templates exist for our most common letters and emails
- [ ] Meeting notes and file notes follow a consistent format
- [ ] We've picked one job to automate first, with a time-saved target

4. Tools and team

- [ ] We've checked what our current software (practice, tax, Microsoft or Google) can already do
- [ ] Client documents live in one place, not scattered across inboxes
- [ ] Staff have had at least an hour's practical training
- [ ] We review what's working every quarter
- [ ] Nobody's buying AI tools before deciding which job they'll do

Your score

Count your ticks out of 20.