

AI MOMENTUM ASSESSMENT

A Quick Check & Planning Tool for Business Leaders



You Don't Need a Score. You Need a Signal.

This short assessment isn't about passing or failing. It's about identifying where your organization already has traction, and where small shifts could create momentum.

Whether you've launched pilots or are still exploring use cases, these questions are designed to surface strengths, gaps, and opportunities to learn faster.

How to Use This Worksheet:

- Use it individually, or as a group reflection tool.
- Answer honestly. This is for clarity, not credibility.
- Highlight one or two areas to take action on next.

THE MOMENTUM ASSESSMENT

Rate your agreement with each statement below on a scale from 1 (Not Yet) to 5 (Consistently True). Ask yourself: How true is this for us today?

CATEGORY	On a scale from 1-5, how true is this today? 1 = not yet true → 5 = consistently true
CLARITY OF PURPOSE	
We've identified business problems where AI could improve how we decide or operate.	
Our first moves are tied to real outcomes—not just experimentation.	
DATA USE IN CONTEXT	
We're using the data we have—not waiting for it to be perfect.	
Our teams know how to connect data to actual business decisions.	
TEAM ALIGNMENT	
The right people (ops, tech, business) are involved early—not just downstream.	
Ownership of AI-related work is clear and distributed—not siloed.	
LEARNING & FEEDBACK	
We reflect on what we've tried and use those insights to inform our next steps.	
Teams feel safe to test, iterate, and adjust without needing perfection.	
ACTION & ACTIVATION	
AI work is tied to decisions or actions that change something in the business.	
The value of what we're doing is visible to others—not buried in a dashboard.	

WHAT'S HELPING YOU MOVE? WHAT'S HOLDING YOU BACK?

Reflect on what surfaced and identify where a small shift could build momentum.

Use this page to turn insights into next steps. You don't need to solve everything. Simply focus on the areas where clarity, confidence, or connection could improve.

Use these questions to guide discussion within your team(s) or for self-reflection:

- Which areas scored highest? What's working there and why?
- Where did we hesitate? Are we unclear, misaligned, or simply underinvested?
- What's one shift we could make in the next 30–60 days to build momentum, remove friction, or learn faster?

MAP YOUR NEXT MOVES

Area to Improve	What We Could Do Next	Who Needs to Be Involved

NEED A SOUNDING BOARD?

We're here to help you think through where to focus next or how to build greater momentum. Reach out – we'd love to discuss! >> hello@leantechniques.com