

SAMPLE · FILLED EXAMPLE · ACMECORP INSURANCE

The Agentic Readiness Scorecard

Completed by: Maria Chen, VP Operations · Agent: Claims-Triage Agent · Date: May 2026

SAMPLE COMPLETED ASSESSMENT

AcmeCorp Insurance · Claims-Triage Agent · FNOL Classification & Routing

Filled answers show what a real assessment looks like. ● = selected answer. Notes show the reasoning behind each response.

DIM.	QUESTION	YES (2)	PART (1)	NO (0)	ASSESSOR NOTES
DATA	Do you have a single source of truth for the data this agent will read or write?	YES			Claims data lives in Guidewire ClaimCenter. Single authoritative source. API-accessible.
DATA	Is that data accessible via a documented API or query interface (not just a spreadsheet)?	YES			Guidewire REST API v2.1 is documented and used by 3 other internal systems.
DATA	Is your data quality monitored with SLAs for freshness and accuracy?		PART		Completeness is monitored (>97%) but no formal freshness SLA yet. Tracking added to Q3 roadmap.
GOVERNANCE	Does your organization have a defined AI acceptable-use policy employees have acknowledged?	YES			AcmeCorp AI Policy v1.2 published March 2026. All 5,200 employees completed acknowledgment.
GOVERNANCE	Is there a named owner responsible for AI incidents and escalations?	YES			David Park (Chief Risk Officer) is the named AI Incident Owner. Documented in governance charter.
GOVERNANCE	Do you have a process for auditing what an AI system did and why?		PART		Audit logging is in place but the review process is manual. Automated audit dashboard in progress.
OPERATIONS	Have you documented the current process this agent would replace or augment, step by step?	YES			FNOL triage SOP documented (23 steps). Process map completed by ops team in Feb 2026.
OPERATIONS	Do you have a tested off-ramp — a way to revert to the human process if the agent fails?	YES			Off-ramp runbook tested in staging March 2026. Manual queue re-activation takes <5 minutes.
OPERATIONS	Are the success metrics for this agent defined and measurable before deployment?	YES			KPIs defined: triage accuracy ≥92%, cycle time <4 min, adjuster satisfaction ≥4.2/5.
TALENT	Does at least one person on the team understand how LLMs work at a functional level?	YES			Sarah Okonkwo (AI Engineer) and James Liu (ML Lead) both have hands-on LLM experience.
TALENT	Do you have engineering capacity to integrate, monitor, and maintain an agent in production?		PART		2 engineers allocated but shared with 2 other projects. Dedicated headcount requested for Q4.
TALENT	Has your team run at least one AI pilot and documented what you learned?	YES			Document processing pilot (2024) produced a lessons-learned report. Key finding: data quality gates critical.

TOTAL SCORE

AcmeCorp scored: 21 / 24

See page 2 for readiness band interpretation and recommended next steps.

21/24 → SCALE

Readiness Rubric

AcmeCorp scored 21/24 → SCALE band. Highlighted below. Three concrete next steps included.

■ ACMECORP RESULT

18 – 24

SCALE

← AcmeCorp: 21/24

Your organization has the data infrastructure, governance posture, operational discipline, and talent to deploy agents in production.

1. Identify your highest-ROI use case and assign a dedicated pilot team within 30 days.
2. Define your agent governance charter: who approves deployments, who owns incidents.
3. Instrument your first agent from day one — latency, error rate, cost per task, escalation rate.

12 – 17

PILOT

You have enough of the fundamentals to run a controlled pilot, but gaps in data, governance, or talent will surface quickly.

1. Map the specific gaps in your score (any No answers) and assign owners to close them before go-live.
2. Choose a narrow, well-defined use case with a clear off-ramp if the agent underperforms.
3. Schedule a 30-day post-pilot review with ops, legal, and the business owner before expanding scope.

6 – 11

EXPLORE

You have pockets of readiness but significant structural gaps. Deploying an agent now would likely create more risk than value.

1. Prioritize data quality and accessibility — agents are only as good as what they can read and write.
2. Assign an AI readiness owner with authority and accountability, not just an enthusiast.
3. Run a 90-day internal education program so your team can evaluate vendors and pilots critically.

0 – 5

DEFER

The foundational prerequisites are not in place. Deploying an agent in this environment will produce unreliable outputs.

1. Focus on data infrastructure first — a clean, accessible, governed data layer is the prerequisite.
2. Establish basic AI governance: a policy, a named owner, and an incident path.
3. Revisit this scorecard in 6 months after addressing the fundamentals.