

# The AI-First Leadership Assessment™

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Finally Know Where You Stand - And What to Do Next



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## What's Your Next Move?

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You're supposed to lead your organization's AI transformation. But every day brings new tools, conflicting advice, and mounting pressure to "do something with AI."

**The result? Analysis paralysis. Expensive mistakes. AI investments that just don't move the needle.**

**Here's the truth:** AI overwhelm is completely normal.

According to Boston Consulting Group<sup>1</sup>, 74% of companies who attempt to adopt AI struggle to achieve value & scale. 42% abandon most AI initiatives *entirely*. Just over one quarter (26%) achieve production value. And only 4% reach high-value AI maturity.

The numbers are stark. But it's not because leaders are behind or doing something wrong; it's because they don't know they you are in the AI transformation journey.

And it's hard to get where you're going when you don't even know where you're starting from.

## The Pattern Forms the Map

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**The good news:** AI transformation follows six predictable stages. Each stage requires different actions, different investments, and different leadership focus. But when organizations skip a stage, they tend to get stuck without understanding why.

Maybe this describes you.

**But there's more good news:** The leaders who succeed aren't smarter or more technical. They just know which stage they're in - and what actions that stage actually requires.

**The fix is simple:** Know your stage. To avoid getting stuck, take the actions required to complete that stage before trying to move to the next stage.

## The Six Stages of AI Transformation

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**Stage 1: Awareness** - You know AI could help, but you're not sure how

**Stage 2: Experimentation** - You're running pilots and learning what works - and what doesn't

**Stage 3: Adoption** - Multiple teams are using AI in their regular workflows

**Stage 4: Value** - You're measuring business impact and proving ROI

**Stage 5: Transformation** - You're systematically incorporating AI into your entire organization

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<sup>1</sup> Boston Consulting Group. (2024). *Where's the value in AI?*  
<https://www.bcg.com/publications/2024/wheres-value-in-ai>

**Stage 6: Just How Things Work** - AI is invisible infrastructure, like email or spreadsheets

Each stage has common roadblocks, demands different actions to progress, and requires different leadership focus. What may be the perfect action to succeed in one stage may kneecap you and corrode stakeholder confidence when taken in another stage.

## What This Assessment Does For You

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This isn't another generic "AI readiness" survey. This assessment reveals:

- **Where you really are** (not where you think you are or wish you were)
- **What's actually blocking your progress** (the specific gap you need to close)
- **Your precise next move** (the one action that will create the most progress)

**The goal:** Never again wonder "What should I do next?" about AI.

## Your 10-Minute Investment

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The assessment takes 10 minutes. The clarity it provides could save you months of wrong moves, expensive mistakes, or just stagnation.

**You'll answer 10 questions about:**

- Your personal AI proficiency and your leadership team's experience
- Your organization's AI planning, resource allocation, and activity level
- How you make AI decisions and measure results
- Your organizational scope and cultural indicators

**Then you'll get:**

- Your exact stage (with verification to ensure accuracy)
- What this stage feels like (so you know you're in the right place)
- Your specific roadblocks and how to overcome them
- Your precise next steps in priority order

## The Result: You Always Know What To Do Next

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No more guessing. No more analysis paralysis. No more wondering if you're moving fast enough or in the right direction.

Just clear, confident action to move forward one more step.

**Ready to find out where you stand?**

## Instructions

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Answer each question honestly based on your organization's current state. There are no right or wrong answers (really). This helps you understand where you are so you can determine the *best* next move - and not waste time and money on lower-value moves.

### Question 1: Your AI Proficiency

What is your *personal* proficiency with AI?

- A. None
- B. I understand AI, but haven't done significant real work with it
- C. I've tried several AI tools, and use some of them occasionally
- D. I use AI regularly for my own work
- E. I use AI and share the results regularly with my peers and stakeholders

**Score:** A=1, B=1, C=2, D=3, E=5

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### Question 2: Leadership AI Proficiency

What is your leadership team's personal proficiency with AI?

- A. Leadership understands AI conceptually but hasn't used it much personally
- B. Some executives have tried AI tools
- C. Leadership regularly uses AI for their own work and shares their experiences
- D. Leadership can evaluate AI proposals with informed judgment

**Score:** A=1, B=2, C=2, D=4

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### Question 3: AI Planning and Communication

Which statement best describes your organization's AI planning?

- A. We're discussing AI informally but have no documented plan
- B. We have an AI plan, but haven't fully communicated it to the team yet
- C. We have a documented AI plan that leadership has communicated to the team
- D. We have a plan and are actively executing on it
- E. AI is integrated into our standard strategic planning processes

**Score:** A=1, B=1, C=2, D=3, E=5

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**Question 4: Resource Allocation**

Has your organization allocated specific resources (budget, time, people) for AI initiatives?

- A. Yes, and leadership has explicitly communicated permission to experiment
- B. Yes, but permission to experiment hasn't been clearly communicated to teams
- C. We're planning to, but haven't yet
- D. No

**Score:** A=2, B=1, C=1, D=1

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**Question 5: AI Activity Level**

Which best describes AI activity in your organization?

- A. No one is using AI for work yet
- B. A few individuals are using it informally
- C. We have active pilot projects/experiments underway
- D. Multiple teams use AI in their regular daily workflows
- E. Most/all functions have active AI workflows

**Score:** A=1, B=1, C=2, D=3, E=5

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**Question 6: AI Usage Pattern**

How would you characterize your organization's current AI usage?

- A. AI use is prohibited
- B. Not actively using it
- C. Still testing and learning what works
- D. Part of regular workflow for some teams
- E. Standard practice across most of the organization

**Score:** A=0, B=1, C=2, D=3, E=5

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### Question 7: Measurement Approach

What AI metrics are you currently measuring? (Select the HIGHEST level that applies)

- A. We're not measuring AI activities yet
- B. We evaluate pilots and projects on a case-by-case basis
- C. We track how many people use AI tools or how often they're used
- D. We measure business outcomes (revenue, costs, quality, time saved)
- E. We have standardized metrics to track AI outcomes

**Score:** A=1, B=2, C=3, D=4, E=5

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### Question 8: Decision Making Process

How do you decide which AI projects to pursue?

- A. We haven't started AI projects yet
- B. Based on individual interest or informal decisions
- C. Leadership decides on a case-by-case basis
- D. We have a process for evaluating and selecting AI opportunities
- E. AI project selection is built into our standard planning processes

**Score:** A=1, B=2, C=3, D=4, E=6

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### Question 9: Organizational Scope

How many functions or departments are actively using AI?

- A. None
- B. 1-2 functions
- C. 3-4 functions
- D. More than half our functions
- E. Nearly all or all functions

**Score:** A=1, B=2, C=3, D=5, E=6

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### Question 10: Cultural Indicators

Which best describes AI in your organization's culture?

- A. We're still evaluating whether AI is right for us
- B. Seen as experimental/optional
- C. Encouraged but not required
- D. Expected as part of professional development
- E. Embedded in how we work - it's just part of the job

**Score:** A=1, B=2, C=3, D=5, E=6

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## Scoring Instructions

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### Step 1: Calculate Your Total Score

Add up the points from Questions 1-10.

Your Total Score: \_\_\_\_\_

### Step 2: Find Your Stage

Based on your total score, go to the corresponding page below:

9-15 points:	Stage 1 (Awareness)	Page 9
16-22 points:	Stage 2 (Experimentation)	Page 10
23-29 points:	Stage 3 (Adoption)	Page 11
30-36 points:	Stage 4 (Value)	Page 12
37-43 points:	Stage 5 (Transformation)	Page 13
44+ points	Stage 6 (Just How Things Work)	Page 14

Your Stage: \_\_\_\_\_

## Important: Verifying Your Stage

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All but the first stage have verification questions at the top of . This catches a common problem: organizations thinking they're more advanced than they actually are.

### If you don't pass the verification:

You're directed back one stage. This isn't failure, it's *clarity* - about what you need to build next and how to avoid getting stuck in later stages.

**Example:** Your score suggests Stage 4, but the gate question makes it clear you don't have baseline metrics. This means you're actually in Stage 3 - you have adoption but haven't proven value yet. You don't need to start over. But you do need to go back to Stage 3 and pick up the missing pieces, one at a time.

Take the verification seriously. Because we can't take the right steps to move forward when we're convinced we've already arrived.

## Your Results

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Find your stage below. Then verify you're really at that stage using the checkpoint question.

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### Stage 1: Awareness

**Score: 10-14 points.**

**What it is:**

You know AI is important and could help your organization, but you're not sure where to start. You haven't yet started meaningful pilots or experiments. Your team is researching, discussing, and watching others, but isn't actively using AI for production work yet.

**What it feels like:**

Overwhelmed by possibilities, paralyzed by options. FOMO mixed with uncertainty.

**Common roadblocks:**

- Analysis paralysis - trying to learn everything before doing anything
- Waiting for "the right" AI strategy before taking action
- Confusing awareness ("we talked about AI") with action

**Evidence to build:**

Clear commitment from leadership (verbal and written) that it's not just okay to experiment - it's expected.

**Gate to Stage 2:**

Active pilot projects or experiments underway (not just planned, but actually happening).

**Next Steps (in order):**

- Get leadership to explicitly say "experiment with AI" (in writing)
  - Start small - run 2-3 pilots in low-risk areas
  - Learn what works (and what doesn't) through direct experience
  - Share early wins to build momentum
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## Stage 2: Experimentation

Score: 15-21 points.

✓ **First, verify you're really here:**

**Do you have pilot projects or experiments already underway?**

- YES** → You're confirmed at Stage 2. Continue below.
- NO** → You've skipped the gate. **Go back to Stage 1.** Start actual pilots before moving forward. Without hands-on experimentation, you'll make expensive mistakes when you scale.

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### What it is:

You have active AI pilots and experiments. You're testing what works and what doesn't. You're learning which use cases deliver value and which don't. Usage is still inconsistent, some experiments fail completely, and results are unpredictable - but you're building real knowledge through experience.

### What it feels like:

Excitement mixed with frustration. Some projects exceed expectations, others fail spectacularly.

### Common roadblocks:

- Trying to scale before learning what actually works
- Confusing implementation ("we're using AI") with production usage ("AI is part of how we work")
- Declaring victory after initial pilots without verifying sustained usage

### Evidence to build:

Evidence that multiple teams are using AI in their regular workflows consistently (not just during pilots).

### Gate to Stage 3:

Regular AI usage across multiple teams - AI is part of daily workflows, not just pilot projects.

### Next Steps (in order):

- Document what works and what doesn't
- Kill projects that aren't working - don't just let them fade
- Scale successful experiments to regular workflows
- Verify usage is actually sustained, not just initial enthusiasm

## Stage 3: Adoption

Score: 22-29 points.

✓ **First, verify you're really here:**

**Are multiple teams using AI in their regular workflows (not just in pilots)?**

- YES** → You're confirmed at Stage 3. Continue below.
- NO** → You're confusing pilot projects with production workflows. **Go back to Stage 2.** Get your pilots working consistently before trying to measure business value. True adoption means AI is part of how work gets done, not just something people tried once.

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### What it is:

Multiple teams are using AI in regular daily workflows. AI is part of how at least some normal work gets done. Usage is consistent and spreading, but the business value it provides is still uncertain.

### What it feels like:

Momentum is building, but outcomes are uneven. Excitement mixed with skepticism.

### Common roadblocks:

- Believing AI usage is increasing without verifying it
- Significant use of AI "shadow apps" which can't be measured at all
- Confusing implementation activity with production usage

### Evidence to build:

Evidence of regular AI usage across multiple teams (usage data, surveys, manager reports, or observations) and baseline metrics established.

### Gate to Stage 4:

Requiring measurement of not only AI usage, but also its business value (both before and after AI implementation).

### Next Steps (in order):

- Establish baseline metrics
- Begin measuring actual business impact (not just usage)
- Create standardized metrics across projects so you can compare results
- Focus on consistency and measurable outcomes

## Stage 4: Value

Score: 30-36 points.

✓ **First, verify you're really here:**

**Do you have baseline metrics from before AI implementation that you can compare against to show business impact?**

- YES** → You're confirmed at Stage 4. Continue below.
- NO** → You've skipped the gate that separates real value from wishful thinking. **Go back to Stage 3.** Without baseline comparisons, you're guessing about AI's impact, and you'll get stuck when stakeholders ask for proof of ROI. Establish your baselines now before expanding further.

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### What it is:

You're measuring business outcomes with baseline comparisons. You can point to specific improvements in revenue, costs, quality, or time. You're proving AI delivers real business value, not just activity - and you're willing to cut AI projects that don't deliver results.

### What it feels like:

Confidence is growing. AI is recognized as a valuable tool, not a novelty.

### Common roadblocks:

- Inability to compare projects due to inconsistent metrics
- Over-optimizing the AI parts of processes so much that you burden the human parts

### Evidence to build:

Standardized processes for selecting, evaluating, and replicating AI initiatives across teams.

### Gate to Stage 5:

Cross-functional operating systems for AI (standardized playbooks, KPIs, governance frameworks, and platform integrations).

### Next Steps (in order):

- Create a systematic process for selecting and prioritizing AI projects
- Build feedback loops so successful approaches can be replicated across teams
- Plan for organization-wide transformation
- Secure leadership commitment for systematic application across all teams

## Stage 5: Transformation

Score: 37-43 points.

✓ **First, verify you're really here:**

**Do you have cross-functional operating systems for AI (such as standardized playbooks, KPIs, governance frameworks, and platform integrations)?**

- YES** → You're confirmed at Stage 5! Continue below.
- NO** → You're attempting transformation without the infrastructure to support it. **Go back to Stage 4.** Without systematic frameworks, your transformation efforts will be inconsistent and unsustainable. Build your operating systems first, or you'll burn out your team trying to scale ad-hoc approaches.

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### What it is:

You're implementing AI systematically within your organization. You have systematic processes for evaluating and selecting AI opportunities. You're rethinking how your entire organization operates, and AI is being built into hiring, onboarding, planning, etc.

### What it feels like:

Exciting with plenty of progress...but sometimes messy. Processes are being redefined in real time, and some attempts fall flat, or look promising but fail to deliver measurable value. Bottom Line: *Expect some chaos* - it's normal and necessary during transformation.

### Common roadblocks:

- Micro-managing
- Over-centralizing transformation efforts (top-down) instead of empowering teams (bottom-up)

### Evidence to build:

Cross-functional operating systems (playbooks, KPIs, governance, platform integrations) and AI pervasive throughout organizational documentation.

### Gate to Stage 6:

AI is pervasive throughout organizational documentation (policies, job descriptions, SOPs, performance evaluations, etc.).

### Next Steps (in order):

- Build adaptive systems and frameworks
- Empower teams to execute within those frameworks rather than micromanaging
- Build AI into all organizational processes systematically
- Work with your people team to embed AI into hiring, onboarding, and career development - making AI adoption cultural, not just operational

## Stage 6: Just How Things Work

Score: 44+ points.

✓ **First, verify you're really here:**

**Is AI pervasive throughout your organization's documentation (policies, job descriptions, SOPs, performance evaluations, etc.)?**

- YES** → You're confirmed at Stage 6. Continue below.
- NO** → You've built impressive AI capabilities, but you're still Stage 5. **Go back to Stage 5.** True cultural transformation means AI decisions are embedded in daily work, not controlled at the top. The final step is letting go - empowering your teams to use AI judgment you've built into your systems.

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### What it is:

Your team has become AI-native. AI use is automatic and unremarkable. New employees adopt AI-first approaches naturally through culture. AI isn't special anymore - it's just how work happens, like email or spreadsheets.

### Important Note:

Very few organizations have reached this stage yet. It represents the end goal where AI has become fully normalized - it's no longer about operations, it's now part of culture. True Stage 6 means AI is so embedded it's an unremarkable part of organizational identity (like the Internet is now).

### What it feels like:

Seamless, natural, part of the organization's identity.

### Common roadblocks:

- Assuming you're "done"
- Neglecting ongoing learning and adaptation

### Evidence to build:

Documentation showing that you continue to build AI into processes, SOPs, and policies. Records that AI decisions are made by individual teams, not top-down. Outputs of systems that continuously evaluate the value of AI as a core business tool, not a shiny object.

### Your ongoing focus:

- Maintain continuous evolution
- Build AI re-evaluation into regular reviews
- Don't assume you're "done" - stay adaptive
- Continue to evolve with AI technology

## The Breakthrough

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Too many leaders approach AI like they're navigating without a compass - trying every direction, hoping something works. But understanding the six stages can help things that felt totally random suddenly click into place.

You realize why that expensive AI initiative stalled out. (You were trying Stage 5 tactics when you were still in Stage 2.) You understand why your team seems resistant to AI tools. (They need Stage 2 experimentation before Stage 3 adoption.) You finally know why so much expert advice feels wrong for your situation. (They're solving for a different stage than where you are.)

The stages aren't just a framework - they're a lens that makes AI transformation predictable instead of chaotic.

Once you know your stage, the path forward becomes clearer. Not easy, necessarily, but clearer. You'll know what to focus on, what to ignore, and what comes next. Most importantly, you'll stop second-guessing yourself and start making progress.

The assessment takes 10 minutes. But the clarity it provides saves months of wandering in the AI wilderness.

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## Want to Go Deeper?

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This assessment is based on frameworks covered more fully in **Lead AI with Confidence: Ditch the hype, deliver results, and build AI into your team's DNA - *without becoming a tech guru***

The book includes:

- Detailed guidance for each stage
- Common failure modes and how to avoid them
- The AI-First Adoption Framework
- Project selection and prioritization tools
- AI+human delegation frameworks

**Pre-launch: November 18th | Special launch price: \$0.99**

Learn more at <https://johnmichaelthomas.ai>, or connect with me on [LinkedIn](#).

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