NEARLY DONE

The AI Readiness Checklist

How much control do you need over your data?

INTRODUCTION

Choose your level of control deliberately

Every AI tool your organisation uses sends information somewhere. The question is how much control you keep over it. There isn't one right answer. The right level depends on what you are putting in and who is entitled to see it.

This checklist helps you choose deliberately, rather than by default. Start with the four levels of control, then tick what applies to your organisation to see where you sit.

The four levels of control

LEVEL 1

Standard cloud AI

Mainstream providers on a normal business account.

Control: Low. Your data is handled under the provider's terms.
Trust required: High. You rely on the provider's policies and settings.
Setup: Minutes.
Best for: General tasks with no sensitive or client-identifying information, such as brainstorming, public-facing copy and research on public topics.

LEVEL 2

Hosted private models (such as Ollama cloud)

Open models run by a hosting service that does not log your prompts.

Control: Medium. No logging is a real step up, but your data still passes through someone else's infrastructure.
Trust required: Medium. You are still trusting the provider's word and practices.
Setup: Easy.
Best for: Everyday work that touches internal information, where you want more privacy than Level 1 without running anything yourself.

LEVEL 3

Self-hosted on a cloud VPS

A private AI model running on a virtual server that you control.

Control: High. You choose the software, who has access and which country the server sits in.
Trust required: Low to medium. The hardware belongs to a hosting company, but the AI environment is yours.
Setup: I design, set up and configure it for you.
Best for: Organisations that need to say clearly where their data lives and who can reach it.

Covers everything: one private model handles sensitive work and public-facing tasks alike, such as marketing copy, website content and research. You do not need separate Level 1 or Level 2 accounts alongside it.

LEVEL 4

On-site self-hosted computer

A private AI model running on hardware in your own premises.

Control: Maximum. Data never leaves your building.
Trust required: Minimal. You own the machine and the environment.
Setup: I design, set up and configure it for you.
Best for: Your most confidential material, or any situation where "it never left the premises" is the answer you need to give.

Covers everything: as with Level 3, one model serves all your AI tasks, confidential and public-facing, with no need for outside accounts alongside it.

Levels 1 and 2 are quick to start, and many organisations use them for everyday tasks. If you choose Level 3 or 4, you do not need to keep them. One private setup serves everything, so there is one environment to manage and one answer to give about where your data goes.

YOUR CHECKLIST

Where does your organisation stand?

Tick everything that applies.

A. What goes into AI tools today?

- [ ] Staff use AI tools and I am not certain which ones
- [ ] Client, customer or personal information is sometimes typed or pasted into them
- [ ] Commercially sensitive material (contracts, financials, strategy) is sometimes included
- [ ] We have no written guidance on what may and may not be entered

B. What do you need to be able to say?

- [ ] A client or regulator has asked, or may ask, where our data goes
- [ ] We have confidentiality or compliance obligations we must be able to demonstrate
- [ ] I cannot currently explain who can access data once it is in an AI tool
- [ ] We would benefit from being able to say "this data never left our control"

C. Where are you now?

- [ ] Everyone uses their own accounts with default settings
- [ ] Nobody has been trained on safe AI use
- [ ] We have bought AI tools but cannot show what they return

How to read your results

GROUP A	Start with visibility and guidance. A short policy and some training will make the biggest difference, and Levels 1 and 2 may be all you need for now.
GROUP B	Look at Level 3 or 4. You need an answer you can stand behind, and one setup you control can cover all your AI work, sensitive or not.
STRONG ON B	Strong ticks on confidentiality and "never left our control" deserve a serious conversation about Level 4.
GROUP C	A strategy and training session will pay for itself quickly, whichever level you choose.

NEXT STEP

Let's map your organisation to the four levels

I help organisations choose the right level, then build the plan, set up the environment and train your people to use it. Book a half-hour coffee conversation and we will work out what is right for you.

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