

The Context Readiness Audit

Is Your Business Ready for AI Agents?

"Context is the New Code"

Most AI implementation failures aren't caused by bad models. They are caused by bad context. If you feed an AI agent conflicting data, outdated PDFs, or ambiguous instructions, it will hallucinate.

Before you hire a developer or build an automation, you must audit your Operational Clarity. Use the checklist below to score your readiness.

AUDIT GOAL

Identify gaps in data structure before investment.

● PART 1 — DATA HYGIENE (THE MEMORY)

☐ Single Source of Truth (SSOT)

Do you have a Master Database where all client data lives with unique IDs?

Fail: Data split across Email, Slack, Excel.

Pass: One Master DB (Baserow/Airtable).

☐ Structured vs. Unstructured

Are rules and pricing in tables, or buried in text paragraphs?

Fail: Pricing buried in 50-page PDF.

Pass: Item | Price | Currency table.

☐ Variable Consistency

Are defined terms used consistently (e.g., Client vs Customer)?

Fail: Terms used interchangeably.

Pass: "Client" always means paying entity.

● PART 2 — PROCESS CLARITY (THE INSTRUCTIONS)

☐ SOP Existence

Do you have written steps a stranger could follow?

Fail: "Everyone just knows how."

Pass: Documented step-by-step guide.

☐ Deterministic Instructions

Are instructions objective rather than subjective?

Fail: "Write a good email."

Pass: "Write email <150 words."

☐ Negative Space Defined

Do you explicitly list what NOT to do?

Fail: Only positive instructions.

Pass: "Do not offer >10% discount."

● PART 3 — LOGIC & ACCESS (THE WORKFLOW)

☐ Logic Mapping

Is the decision process an If/Then flow?

Fail: Reliance on "gut feeling".

Pass: IF [Unpaid] THEN [Email].

☐ API Accessibility

Is data accessible via modern API?

Fail: Proprietary/Locked system.

Pass: Modern platform (Notion/Hubspot).

The Scorecard

MOSTLY UNCHECKED?

The Danger Zone

DO NOT build an agent yet.
Focus on Digitisation first. Move documents to databases.

HALF CHECKED?

The Hybrid Zone

Ready for "Human-in-the-loop". Build workflows that draft output for human approval.

MOSTLY CHECKED?

Agent Ready

You have "Context Engineering". Deploy autonomous agents. Your data is your moat.

Next Steps

- Start small: Pick one process (e.g., Client Onboarding).
- Structure the data into tabular formats.
- Tighten the SOP to be deterministic.
- Map the logic into If/Then flows.

EVALUATED BY

DATE