

# Is your team ready for AI?

A self-reflection and action planning guide



 **smartsheet**

AI is reshaping project planning and execution, but successful adoption begins with knowing where your team stands. Use this guide to assess your current processes, find the right starting point, and plan your next step with AI.

## SECTION 1: FOUNDATIONAL READINESS

### Ask yourself:

- Is our project data clean, consistent, and easy to access across tools and teams?
- Do we have reliable records of past project performance (timelines, risks, outcomes)?
- Are our planning and resourcing processes standardized or ad hoc?
- Do our current tools integrate with AI or offer AI-powered features?

### Pro Tips:

- If you answered “no” to most of these, focus first on strengthening foundational practices like clean, consistent project data, tool alignment, and process documentation.
- If your current platform doesn’t offer native AI capabilities, explore integrations or features that support automation, summarization, or forecasting.
- Align your tech stack: Make sure your core project tools speak to each other. Clean data is only useful if it’s flowing between systems your team actually uses.

## SECTION #2: WHERE AI CAN MAKE THE BIGGEST IMPACT

### Ask yourself:

- Do project managers spend a significant amount of time on manual reporting or task updates?
- Do we often struggle to match the right people to the right work?
- Do stakeholders feel confident in project visibility and forecasting?
- Are we using historical project data to guide decisions?

### Pro Tips:

- Pinpoint your biggest bottlenecks: That’s where AI can make an immediate impact.
- Start small: Even a single AI-powered workflow (like auto-generated status updates) can free up hours of PM time each week.
- Look for repeatable problems: If the same issues come up again and again, AI can help you spot the pattern and proactively address root causes.

## SECTION 3: TEAM MINDSET AND CHANGE READINESS

### Ask yourself:

- Are our teams open to new tools and process improvements?
- Do we have a shared understanding of what AI is (and isn’t) here to do?
- Do team leads feel confident interpreting AI insights and applying them to their work?
- Are we aligned on the responsible use of AI? Especially around data, security, and oversight?

### Pro Tips:

- If you’re still building understanding or buy-in, focus your efforts on education and aligning on shared goals for AI. Start small, communicate often, and build trust as you go.
- Lead by example: When team leads model responsible AI use and share wins, it builds momentum and confidence across the organization.
- Keep the conversation going: AI adoption isn’t a one-time switch. Create space for questions, feedback, and iteration so your team feels supported throughout the change.

## Your AI readiness roadmap starts here

Explore how Smartsheet helps teams adopt AI responsibly by reducing busywork, improving planning, and making better decisions faster.

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