

TECHNICAL

AI Integration Readiness Checklist

Assess your technical infrastructure and data readiness before integrating AI

22 checklist items

How to use this checklist:

Work through each item in order. Check off completed tasks as you go. Items marked [!] are critical - do not skip them. Share this checklist with your team and assign owners to each section for accountability.

About GetServices.ai

GetServices.ai is the AI services marketplace connecting businesses with vetted AI experts, tools, and implementation support. Our resources are free to use and share. Visit getservices.ai to explore AI services.

AI Integration Readiness Checklist

Data Readiness

☐  Identify all data sources the AI will need access to and document their formats.

☐  Assess data quality: completeness, accuracy, and recency of each data source.

Note: AI performance is directly limited by data quality. Garbage in, garbage out.

☐  Confirm data is accessible via API or structured export - not locked in legacy systems.

☐ Document data refresh frequency: how often does source data update?

☐  Identify and resolve PII in training data - anonymize or pseudonymize as required.

Infrastructure

☐ Confirm your network can handle additional API call volume without latency degradation.

☐  Verify API authentication method (OAuth 2.0, API key, JWT) is supported by your AI vendor.

☐ Test webhook delivery reliability - confirm your endpoint can receive and process events.

☐  Confirm your firewall/security rules allow outbound connections to AI vendor endpoints.

☐  Set up a staging environment that mirrors production for integration testing.

Systems Integration

☐  Map the integration architecture: which systems connect to the AI and in what direction?

☐  Identify the system of record for each data type - avoid creating conflicting data sources.

☐  Test error handling: what happens when the AI API is unavailable? Does your system degrade gracefully?

Note: Always build a fallback for AI unavailability - never make AI a single point of failure.

☐ Confirm bi-directional sync if AI needs to write back to your CRM/ERP.

Testing

☐  Create a test dataset with known inputs and expected outputs for validation.

☐  Run load testing at 2× expected peak volume before production launch.

☐ Test edge cases: empty inputs, malformed data, extremely long inputs, special characters.

☐  Conduct end-to-end user acceptance testing (UAT) with real users before go-live.

☐ Document all test results and sign-off from technical and business stakeholders.

☐  Confirm monitoring and alerting is in place before switching production traffic.

☐  Verify rollback procedure: can you revert to the pre-AI workflow within 30 minutes?

☐ Complete a security penetration test or vulnerability scan of the integration layer.