

AI-Ready Data Checklist

For Recruitment Agencies Preparing for AI, Automation & Advanced Analytics

Use this checklist to assess whether your CRM and wider data ecosystem is ready for modern AI tools, copilots, automation and reporting.

I. Data Completeness

- Candidate records contain core fields (name, email, phone, location)
- Job records include required fields (status, owner, dates, assignment info)
- Company/contact records include key details
- Mandatory fields are defined and used consistently
- Placement/assignment data is complete and accurate

II. Data Quality

- Duplicate candidate records are under control
- Duplicate contacts/companies are reduced
- Consistent formatting across phone numbers, emails, job titles and addresses
- Accurate skill tagging and candidate classification
- Clear, consistent job statuses and workflow stage usage

III. Data Freshness

- Candidate records updated within last 6–12 months
- Job data reflects current, real pipeline activity
- Contacts/companies refreshed on a regular cadence
- Stale or inactive data is archived or marked appropriately

IV. Data Structure & Taxonomy

- Skills taxonomy is defined, relevant and consistently applied
- Job categories and role types follow a unified structure
- Markets/regions/sectors use a standard naming framework
- Pipeline stages match real recruiter workflow
- Custom fields are documented and actively used (no clutter or legacy fields)

V. Data Governance

- Clear record ownership rules (candidates, companies, jobs)
- Defined responsibilities for data updates and stewardship
- A written data governance policy exists and is understood internally
- Routine data hygiene cycles are in place (weekly/monthly)
- Managers have visibility into data quality KPIs

VI. Compliance & Privacy

- GDPR policies are up-to-date and enforced
- Consent handling is recorded and maintained
- Data retention and candidate lifecycle rules are followed
- Sensitive data is access-controlled
- AI usage aligns with internal Responsible AI guidelines

VII. System Consistency

- All teams use the CRM in a consistent way
- Automation logic depends on clean, standardized data
- Integrations (marketing, automation, back-office) map correctly
- Recruiters follow unified processes for core actions
- No unapproved workflows or custom fields creating noise

VIII. Technical Foundations for AI

- CRM supports API access and structured retrieval
- Data stored in formats friendly to semantic search / embeddings
- High-value documents (CVs, notes, JDs) are accessible to AI tools
- Audit trails allow transparency around automated actions
- Controlled access levels available for AI assistants/copilots

IX. Analytics Readiness

- KPIs and dashboards reflect accurate, trusted data
- Data definitions (e.g., job coverage, submissions, CV-sent) are standardised
- Missing values don't break reporting
- Funnel metrics align with operational reality
- Leadership trusts the data they see

X. Organisation Readiness

- Teams understand what “AI-ready data” means
- Training plan in place for recruiters and managers
- Incentives support good data behaviours
- Clear roadmap for AI use cases
- Leadership sponsorship is secured

AI-Readiness Score (Optional)

Score each item from 0–2:

- 0 = Not in place
- 1 = Partially in place
- 2 = Fully in place

Total out of 40:

- 32–40 → High readiness
- 24–31 → Medium readiness — address gaps before scaling AI
- 0–23 → Low readiness — data hygiene and CRM optimization required first