

AI Data Readiness Checker

Is your AI reading this week's numbers, or last month's? Twelve questions, four areas, about five minutes to score your portfolio.

6%

of portcos arrive ready for AI deployment within 100 days

71%

of portfolio CFOs cite data infrastructure as a top barrier

14%

of Operating Partners have moved AI beyond back-office automation

Source: Accordion, Q2 2026 PE AI adoption benchmark

How to score. Answer for your portfolio as a whole and circle one score per question. Add up each area, then turn the page for your total.

0 Not yet 1 Partly 2 Yes, portfolio-wide



01 Freshness

Is your AI reading this week or last month?

Subtotal ____ / 6

- Q1** When your AI answers a question about a portco, is the data behind it less than a week old? 0 1 2
- Q2** Can you see pipeline, bookings and headcount between board meetings, not just at month end? 0 1 2
- Q3** Would you spot a miss on EBITDA or bookings before it shows up in the board pack? 0 1 2



02 Structure

Do the numbers mean the same thing at every portco?

Subtotal ____ / 6

- Q4** Does a metric like ARR or pipeline coverage mean the same thing at every portfolio company? 0 1 2
- Q5** Does portco data land in one standard data model, not a stack of separate Excel templates? 0 1 2
- Q6** Does your AI know the context behind each metric: what it measures and how it is calculated? 0 1 2



03 Trust

Would you put the answer in front of an IC or LP?

Subtotal ____ / 6

- Q7 Can every number your AI gives you be traced back to its source system? ☐ 0 ☐ 1 ☐ 2
- Q8 Do portco teams review and approve their data before it reaches the GP? ☐ 0 ☐ 1 ☐ 2
- Q9 Would you put an AI-generated answer in front of your IC or LPs without re-checking it by hand? ☐ 0 ☐ 1 ☐ 2



04 Access

Can your AI actually reach the data?

Subtotal ____ / 6

- Q10 Can your AI query portco CRMs, ERPs and finance systems directly, not exported files or decks? ☐ 0 ☐ 1 ☐ 2
- Q11 Are portcos without modern APIs (legacy ERPs, spreadsheets, emailed files) still covered? ☐ 0 ☐ 1 ☐ 2
- Q12 Can your AI query the data where it lives, without copying it into another data lake to host and secure? ☐ 0 ☐ 1 ☐ 2

What your score means

Total ____ / 24

0 to 9

Reading the past

Your AI is summarising board packs. Fluent answers, weeks out of date. Start with freshness: connect the systems that move fastest.

10 to 17

Partly live

Some portcos or metrics are current, others still arrive by spreadsheet. Normalise and close the gaps so answers hold across the portfolio.

18 to 24

AI-ready

Live, structured, trusted data. Put it to work on early warnings, value creation tracking and LP reporting.

Scored under 18? Keep your AI. Fix what it reads.

Planr connects to your portcos' CRMs, ERPs and finance systems, normalises the data and serves it to the AI you already use through MCP. Book a demo and we'll look at where your AI's data comes from today and what it would take to make it live.

[Book a demo](#)