

Client readiness checklist

For any machine learning or data project, before the first working session

This is the list of things we will need to know. We send it in advance because the answers usually live in several different heads, and gathering them takes longer than the first meeting allows.

Very few clients can complete all of it, and that is expected. An empty section is useful information rather than a failure — it normally tells us exactly where the first two weeks of work should go. Tick what you have, ignore what does not apply, and write “don’t know” without embarrassment.

1. The problem you want solved

If only one section gets completed, make it this one.

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| ☐ | A single sentence naming the decision or task that would change if this worked | One sentence, not a paragraph |
| ☐ | Who does this job today, and roughly how long it takes them | |
| ☐ | What “good enough to put into use” looks like, as a number if you have one | |
| ☐ | What has already been tried, including what failed and why | Failures are the useful part |
| ☐ | Roughly what the current situation costs you per year | |

2. The data

Most projects are decided here rather than by the choice of model.

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| ☐ | A named person who can grant access, and how long approval usually takes | Often the longest pole |
| ☐ | Roughly how many records, covering what period | |
| ☐ | Where it actually lives: database, spreadsheets, instrument exports, paper | |
| ☐ | Whether the thing you want to predict is genuinely recorded in the data | Surprisingly often it is not |
| ☐ | Known gaps, known errors, and any change in how it was collected | |
| ☐ | Whether any of it has been labelled or annotated, and to what standard | |
| ☐ | Whether a sample can be shared before the full agreement is in place | |

3. Governance, legal and ethics

Cheap to sort out now; expensive to retrofit.

☐	Whether the data includes personal or special category data	
☐	Any existing DPIA, ethics approval or research protocol	
☐	Who signs a data processing agreement, and the usual turnaround	
☐	Whether the finished system is likely to be regulated	Medical device, EU AI Act, sector rules
☐	Any restriction on where data may be processed or stored	
☐	Whether third-party or licensed data is involved, and on what terms	
☐	Whether you need us to avoid third-party AI tools during delivery	Tell us at the start, not at audit

4. People and decisions

Projects stall on availability far more often than on difficulty.

☐	The budget holder, and whether the budget exists or needs approval	
☐	The person who would use the output day to day	
☐	Who can say no to this, and when they will be consulted	Better early than at sign-off
☐	Who on your side will own the result after handover	
☐	How much of that person's time is realistically available per week	

5. Technical environment

☐	Where the system needs to run: your cloud, on-premise, an instrument, air-gapped	
☐	Who grants an environment and credentials, and how long that takes	
☐	Existing tooling we should fit into rather than replace	
☐	Constraints on languages, vendors or open source licensing	
☐	Any existing model or system this would replace, and who maintains it	

6. Success, and what happens afterwards

The part that is usually left until it is too late to answer well.

☐	How success will be measured, agreed in writing before work starts	
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| ☐ | Who monitors the system once it is live | |
| ☐ | What happens if its performance degrades, and who would notice | |
| ☐ | Expectations about retraining, and who pays for it | |
| ☐ | The date by which this must be useful, and what that date is tied to | A real constraint, or a hope? |

Before the first call, please send us

- The one-sentence problem statement from section 1.
- A sample of the data, or a description of it if access will take time.
- Anything already written about the project: a business case, a failed proposal, a research protocol.
- Your honest answer to the first item in section 6.

Send to info@nodalsavvy.com, or call +234 703 555 1484 if you would rather talk it through. If any of it is sensitive, ask us first and we will put a data processing agreement and a secure transfer method in place before you send anything.