

Document Intelligence Readiness Checklist

Is your organization ready for a purpose-built knowledge system?

Check each statement that applies to your organization. The more boxes you check, the more likely a document intelligence system could transform how your team works.

- ☐ You have thousands of documents spread across drives, emails, and folders
- ☐ Team members spend hours searching for information they know exists somewhere
- ☐ Due diligence or compliance reviews require manual document-by-document searching
- ☐ New team members take months to get up to speed on project history
- ☐ You answer the same questions from investors, lenders, or stakeholders repeatedly
- ☐ Critical institutional knowledge leaves when experienced staff depart
- ☐ Important details have been missed because they were buried in old documents
- ☐ Multiple projects share similar document types but aren't connected or searchable
- ☐ You've tried "just uploading to ChatGPT" but hit limits on context or accuracy
- ☐ Your team wastes time re-creating work because they can't find previous versions
- ☐ Regulatory or contractual obligations require tracking information across many files
- ☐ You need to quickly answer questions that span multiple documents or projects

Score Your Results

- 0–3 checked:** Standard file organization may be sufficient for now
- 4–7 checked:** Document intelligence could save your team significant time
- 8+ checked:** Strong candidate for a purpose-built knowledge system

Ready to explore what's possible?

Schedule a discovery call to discuss your document challenges and see how a purpose-built knowledge system could work for your organization.

Book a call: cal.com/mcohen-project-path