



# **Ai Readiness Checklist**

# TIME & TASK CLARITY

Answer yes / somewhat / no to each question:

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- 1 . I know exactly which tasks in my business are Repetitive and time-consuming.

YES     SW     NO

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- 2 . I can list at least 3 tasks I do weekly that don't require human creativity.

YES     SW     NO

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- 3 . I regularly feel bottlenecked by how long things take to execute.

YES     SW     NO

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- 4 . I have documented processes (even informal ones) for key tasks.

YES     SW     NO

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**If this section scores low, AI won't help yet.  
clarity comes before automation.**

Email

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# REVENUE & IMPACT AWARENESS

Answer yes / somewhat / no to each question:

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5 . I know which activities directly generate revenue in my business.

YES     SW     NO

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6 . I can identify where faster execution would lead to faster cash flow.

YES     SW     NO

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7 . Sales, marketing, or follow-ups often get delayed due to lack of time.

YES     SW     NO

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8 . I repeat the same explanations, emails, or proposals to prospects.

YES     SW     NO

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**High scores here = immediate AI ROI opportunities**

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# DATA & ASSETS READINESS

Answer yes / somewhat / no to each question:

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9 . I have existing content, emails, SOPs, or notes I could reuse or refine.

YES  SW  NO

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10 . My business knowledge mostly lives outside my head.

YES  SW  NO

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11 . I have access to customer questions, feedback, or past conversations.

YES  SW  NO

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12 . I can easily locate key documents or information when needed.

YES  SW  NO

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**AI works best when it has something to work with – not when everything is starting from zero.**

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# TEAM & OPERATIONS

(Skip if Solo)

Answer yes / somewhat / no to each question:

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13 . Tasks break or slow down when one person is unavailable.

YES  SW  NO

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14 . Onboarding or training takes more time than it should.

YES  SW  NO

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15 . Different people do the same task in different ways.

YES  SW  NO

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16 . I wish decisions didn't depend so heavily on one person.

YES  SW  NO

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**AI here reduces friction, not people.**

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# Mindset & Adoption Readiness

Answer yes / somewhat / no to each question:

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17 . I'm open to experimenting before trying to "get it perfect."

YES     SW     NO

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18 . I don't expect AI to replace strategy — just to support it.

YES     SW     NO

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19 . I'm willing to test small improvements instead of full overhauls.

YES     SW     NO

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20 . I want AI to save time now, not someday.

YES     SW     NO

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**AI rewards action-takers more than planners.**

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# SCORING & INTERPRETATION

## 0-7 YES : AI CURIOUS

You need clarity before tools. Strategy first.

## 8-14 YES : AI READY

You'll see fast wins with the right focus areas.

## 15+ YES : AI OPTIMIZABLE

You're leaving time and money on the table.

## What This Means for You

AI success isn't about using more tools — it's about using AI in the right places first.

Most businesses only need 3-5 AI-supported workflows to see real ROI.

**BOOK YOUR  
30-MINUTE AI AUDIT**



If you answered "No" to more than 5 questions, AI won't magically fix that — but it will expose where your business needs structure.

That's where real leverage begins and where we can help guide you. Scan the QR code to book a complimentary AI Readiness Audit with us!



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