CHECKLISTS AND GUIDES // READINESS

Is your business ready for AI?

A 20-point self-check for owners and managers of small and medium businesses. It takes 15 minutes and needs no technical background.

> **Travis's short version:** AI works best on work that is repetitive, follows rules and is already recorded somewhere. This checklist shows whether you have that, and what to fix first if you don't.

How to use it

Tick each statement that is true **today** for your business, not the way you hope it will be next year. Be honest. A "not yet" is useful information rather than a failure, because it points to the groundwork worth doing first. You can answer for the whole business or for the one process you have in mind.

No technical knowledge needed. You are describing how the business runs, not the IT. If you are the owner, it helps to fill it in with your office manager or bookkeeper, because they usually know where the work really gets stuck. Even better, ask two or three people to tick it separately and compare answers.

A. The work

Is the work itself the kind that suits automation?

- ☐ **1.** We have tasks someone repeats most days, such as booking, data entry, chasing or reporting.
- ☐ **2.** Those tasks follow rules, even if the rules have never been written down.
- ☐ **3.** At least one task takes a person more than five hours a week.
- ☐ **4.** Work often stalls because someone is away, busy or hasn't replied.
- ☐ **5.** We copy the same information from one place to another, such as email to spreadsheet or form to system.

B. The information

Is the information AI would need available and reasonably trustworthy?

- ☐ **6.** Our key business information lives in a system or spreadsheet, not only in people's heads.
- ☐ **7.** Customer, job or order records are mostly accurate and up to date.
- ☐ **8.** We can get our data out of the systems we use, as a report or a spreadsheet file.
- ☐ **9.** Quotes, contracts and procedures are stored in one place where they can be found.
- ☐ **10.** We know which information is sensitive and who is allowed to see it.

C. The systems and the people around them

Can new tools slot in without disrupting everyone?

- [ ] **11.** We treat one system (even a spreadsheet) as the single version of the truth for customers or jobs.
- [ ] **12.** Our main software is cloud-based and kept up to date by the vendor.
- [ ] **13.** We could give a new tool limited, read-only access to begin with.
- [ ] **14.** Customers, suppliers and trades could keep working the way they do today.
- [ ] **15.** Someone could spare a day or two to explain how things really work.

D. The decisions

Is there an owner, a measure and a safety net?

- [ ] **16.** Someone senior can say yes or no to a change without a long approval process.
- [ ] **17.** A named person would own the result.
- [ ] **18.** The team feels the problem and is open to a better way of working.
- [ ] **19.** We roughly know today's baseline, such as hours spent, response time or error rate.
- [ ] **20.** Where a mistake would be costly, a person would still check the work.

What your score means

Ticks	Where you stand	What to do next
0 to 9	Getting started. The foundations need attention first.	Pick one process, write down the steps, and move its data out of heads and inboxes into a shared system.
10 to 15	Nearly there. Some groundwork is done.	Choose one process where most boxes are ticked and test an automation on it. Fix the gaps as you go.
16 to 20	Ready. You can choose a first use case now.	Pick the task with the clearest payoff and the cheapest mistakes, and prove it on real work before you build.

This is a conversation starter, not a verdict. Two or three ticks missing in the right places can matter more than the total.

Want to talk this through for your business?

Book a free 15-minute call. We'll look at your situation and give you a straight answer, with no jargon and no sales pitch.

Let's Chat

Opens the request form on our website. Free, no obligation.