

AI Readiness Checklist for Small Businesses

Check every statement that's true for your business today. Be honest: a low score is useful, because it shows what to fix first. Takes about 15 minutes, best done with one or two people who do the day-to-day work.

01 Processes

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- ☐ We can name the 3–5 tasks that take the most repetitive hours each week.
- ☐ Those tasks are written down step by step, including the exceptions.
- ☐ People who do the same task do it the same way.
- ☐ We know roughly how many hours a week each of those tasks takes.
- ☐ Each important process has an owner who can say how it should work.

03 Systems & tools

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- ☐ Our main tools are cloud-based or offer integrations.
- ☐ We have a list of the software we pay for and what each one is used for.
- ☐ Logins are company accounts, not someone's personal email.
- ☐ Tools that should talk to each other are connected, or could be.
- ☐ Someone keeps our website, software and plugins updated.

02 Data

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- ☐ Customer, job and order information lives in business systems, not personal spreadsheets or inboxes.
- ☐ Each kind of information has one main source of truth.
- ☐ Our data is mostly accurate: few duplicates, gaps or outdated records.
- ☐ We can export our data, or reach it through an integration.
- ☐ We know which data is sensitive (customer, health, financial) and where it's stored.

04 People

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- ☐ Leadership supports trying AI on a real problem.
- ☐ One person has time to own the first project.
- ☐ The people who do the work will help design the automation.
- ☐ The team has tried tools like ChatGPT and knows what they can and can't do.
- ☐ We're willing to have a person review the results until we trust them.

05 Security & policy

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- ☐ We have simple rules for what staff can and can't paste into AI tools.
- ☐ We know which AI tools our staff already use.
- ☐ Admin accounts use two-factor authentication.
- ☐ API keys and passwords are stored securely, not in documents, emails or code.
- ☐ We know our compliance needs (HIPAA, PCI, client contracts) that affect where data can go.

06 Goals & budget

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- ☐ We have one specific problem we want AI to solve first.
- ☐ We can measure success: hours saved, response time, errors or revenue.
- ☐ We've set aside budget and time for a first project.
- ☐ We've agreed what "good enough" looks like before we automate.
- ☐ We plan to start with one workflow, not everything at once.

Your score

Total: ___ / 30

24-30	Ready to scale	Strong foundations. You can automate several workflows and connect your systems, with people approving the important steps.
15-23	Ready for a first project	Pick one high-volume task with clear rules, automate it with a person in the loop, measure the hours saved, then do the next one.
0-14	Build the foundations first	Document your top tasks, get your data into one place and set simple AI rules. Most of this costs nothing and makes every later project cheaper.

Any area with 2 or fewer checks is the first thing to fix, whatever your total.

Plan your first project

List your most repeated tasks and roughly how many hours each takes a week. The best first project is high-volume, rule-based and uses data you trust.

1. _____ hrs/week
2. _____ hrs/week
3. _____ hrs/week

Area to fix first: _____

Want this done for you? The **Prodjex AI Readiness Audit** maps your workflows and prodjex.com/ai-readiness-audit · (816) 219-1899 gives you a ranked, costed plan.