

AI Tool Readiness Checklist

Decide where AI actually helps your business — before you buy another tool.

WHAT THIS CHECKLIST DOES

AI is the most hyped — and most poorly implemented — category of business software right now. Most small and mid-size businesses either avoid it entirely (missing real savings) or buy on impulse with no clear problem to solve (wasting money). This checklist cuts through the noise: it scores your readiness, maps your highest-value AI opportunities by function, surfaces the risks to manage, and gives you a scored recommendation before you spend a dollar. It's not about whether AI is good or bad — it's about whether it's right for your business, right now.

HOW TO USE IT

1 Answer every question honestly

There are no right or wrong answers — only accurate ones. Overstating your readiness leads to bad decisions. Honesty here protects you from the hype.

2 Watch your score build

Each section scores itself as you answer. Your total sets your AI Readiness Level — from “Not Yet Ready” to “High-Value Opportunity” — each with clear next steps.

3 Use the Opportunity Map

Even if your overall readiness is low, specific functions may be high-value targets. The map points you to the one area where AI pays off fastest with least risk.

4 Revisit annually

Readiness changes as you grow, your data improves, and tools mature. A “Not Yet” today can become a “Yes” in 12 months with the right groundwork.

Time to complete

45–90 min — do it in one sitting

Who does it

Owner + ops or department lead

When to run

Before any AI purchase; repeat yearly

Sections A & B — answer honestly, score builds automatically.

YES = full points · PARTIAL = half · NO = 0. Totals compute live in Adobe Acrobat Reader.

A Business Readiness *Do you have a real problem for AI to solve?*

QUESTION	YES	PART	NO	NOTES / CONTEXT	PTS
You have a clearly defined, repetitive task that eats significant time. <i>E.g., sorting emails, generating the same weekly report, answering the same questions</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	3
The problem happens often enough to justify a technology solution. <i>At least weekly — one-off tasks rarely justify AI investment</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	2
You can describe the desired outcome in one sentence. <i>If you can't define "done," an AI tool can't deliver it either</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	2
At least one team member is willing to champion the new tool. <i>AI tools need a human advocate during setup and adoption</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	2
You have a budget allocated (even a rough range). <i>Even "\$0, free tools only" is valid — blank is not</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	1

Section A score YES = full · PARTIAL = half · NO = 0 / 10

B Data & Process Readiness *Is your foundation strong enough for AI to build on?*

QUESTION	YES	PART	NO	NOTES / CONTEXT	PTS
The process you want to automate is documented or consistently followed. <i>AI amplifies your process — it can't fix a chaotic one</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	3
You have at least 3–6 months of consistent historical data for it. <i>Forecasting and automation tools need prior data</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	3
Your data is stored digitally (not mainly on paper or in people's heads). <i>AI can't read paper files, whiteboards, or tribal knowledge</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	2
You know where your relevant data lives and who owns it. <i>Scattered across 4 apps with no owner = a data-readiness gap</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	2

Section B score YES = full · PARTIAL = half · NO = 0 / 10

TIP Section B is the most predictive of AI failure. If you scored below 5 here, fix your process first — then revisit AI.

Sections C & D — answer honestly, score builds automatically.

YES = full points · PARTIAL = half · NO = 0. Totals compute live in Adobe Acrobat Reader.

C Team Readiness *Will your team actually use it — and use it safely?*

QUESTION	YES	PART	NO	NOTES / CONTEXT	PTS
Your team understands AI assists humans — it doesn't replace judgment. <i>Over-trusting AI output without review creates serious risk</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	3
At least one person has used an AI tool (any tool) in the last 90 days. <i>Familiarity reduces resistance — even ChatGPT or Canva AI counts</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	2
You're prepared to invest time in setup, training, and prompt refinement. <i>Most AI tools need 2–4 weeks of calibration to deliver value</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	3
Your team has the capacity to absorb a new tool right now. <i>Adopting during a busy season sharply increases failure risk</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	2

Section C score YES = full · PARTIAL = half · NO = 0 / 10

D Risk & Compliance *Have you thought through what could go wrong?*

QUESTION	YES	PART	NO	NOTES / CONTEXT	PTS
You've reviewed what customer or employee data the tool will access. <i>PII, financial, or health data needs a handling review first</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	3
You understand the vendor's data privacy policy. <i>Free AI often trains on your data; paid tiers often don't — confirm</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	3
You're not in a regulated industry that restricts AI without review. <i>Healthcare, finance, legal, childcare have rules that vary by region</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	2
You have a plan to review AI outputs before they reach customers. <i>"Set and forget" AI in customer-facing use = brand and legal risk</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	2

Section D score YES = full · PARTIAL = half · NO = 0 / 10

TIP Section D isn't meant to scare you — it's meant to protect you. A 30-minute data review now prevents expensive problems later.

Where does AI deliver the most value in YOUR business?

Rate each function on its own. Interest x Readiness = your Priority Score — highest scores are where to start.

BUSINESS FUNCTION	WHAT AI CAN DO HERE	INT 1-5	RDY 1-5	PRIORITY IxR	EXAMPLE AI TOOLS
Customer Service & Support	Answer FAQs, draft replies, summarize tickets, route inquiries	<input type="text"/>	<input type="text"/>	<input type="text"/>	Intercom, Tidio, Zendesk AI, ChatGPT
Marketing & Content	Write emails, ads, social posts, web copy, product descriptions	<input type="text"/>	<input type="text"/>	<input type="text"/>	Jasper, Copy.ai, HubSpot AI, Canva AI
Sales & Outreach	Personalized follow-ups, prospect research, lead scoring, proposals	<input type="text"/>	<input type="text"/>	<input type="text"/>	HubSpot, Salesforce Einstein, Apollo, Clay
Finance & Admin	Categorize expenses, flag anomalies, summaries, invoice matching	<input type="text"/>	<input type="text"/>	<input type="text"/>	QuickBooks AI, Ramp, Brex, Dext
Operations & Scheduling	Optimize schedules, predict demand, route orders, draft SOPs	<input type="text"/>	<input type="text"/>	<input type="text"/>	Motion, Reclaim.ai, Notion AI, Monday AI
HR & People	Screen resumes, draft job posts, onboarding guides, HR Q&A	<input type="text"/>	<input type="text"/>	<input type="text"/>	Workable, Rippling AI, Notion AI, Leena AI
IT & Security	Monitor anomalies, classify tickets, docs, detect phishing	<input type="text"/>	<input type="text"/>	<input type="text"/>	Darktrace, Copilot for Security, 1Password
Analytics & Reporting	Plain-language data summaries, auto dashboards, trend flags	<input type="text"/>	<input type="text"/>	<input type="text"/>	Tableau AI, Power BI Copilot, Polymer
Internal Knowledge & Docs	Answer staff questions from docs, summarize meetings, draft SOPs	<input type="text"/>	<input type="text"/>	<input type="text"/>	Notion AI, Guru, Glean, Microsoft Copilot
Industry-Specific	Vertical AI for your exact industry — enter your top use case	<input type="text"/>	<input type="text"/>	<input type="text"/>	Research "[your industry] + AI tools"

YOUR TOP AI PRIORITY

highest Interest x Readiness — fills in automatically

Function

Priority

/ 25

Section E — evaluate any specific AI tool you're considering.

YES = full points · PARTIAL = half · NO = 0.

E Vendor & Tool Evaluation *Answer these before purchasing any specific AI tool*

QUESTION	YES	PART	NO	NOTES / CONTEXT	PTS
The tool solves a specific, named problem — not a vague “efficiency” goal. <i>“Save time on customer emails” beats “improve productivity”</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	3
You've confirmed it integrates with your existing software stack. <i>Check CRM, email, accounting — no integration means data silos</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	3
You understand the pricing model fully (per seat, use, output, or flat). <i>Model your cost at 3x current usage — AI pricing can scale fast</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	2
You have a free trial or pilot before committing to an annual contract. <i>Any reputable AI tool offers at least a 14-day trial</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	2
You know who at the vendor to contact when something breaks. <i>Support quality matters more for AI than almost any category</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	2
You've defined what “success” looks like at 30 and 90 days. <i>Without a benchmark you can't tell whether it's actually working</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	3
You'll assign one internal person to own, calibrate, and monitor it. <i>AI tools without an owner drift into misuse or abandonment</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	2
You have a plan to review AI outputs before they reach customers. <i>Human review of external AI output is non-negotiable for 90 days</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	3

Section E score YES = full · PARTIAL = half · NO = 0 / 20

AI TOOL RED FLAGS *Walk away if any of these are true*

- **The vendor can't clearly explain what data the tool accesses and how it's stored.**
Data opacity is a dealbreaker — especially for tools touching customer or financial data.
- **The tool promises to “fully automate” or “replace” a core function with no human oversight.**
AI augments; it doesn't replace. Any tool claiming otherwise is overpromising.
- **Pricing is based entirely on output volume with no cap or predictable ceiling.**
Uncapped usage pricing produces surprise invoices. Always model worst-case cost.
- **No customers in your industry or size are listed as references.**
Tools tuned for enterprise often fail at SMB scale and complexity.
- **The vendor pressures you to sign annually before you've finished a trial.**
Legitimate AI earns confidence in 30 days. Pressure to sign early is a warning.

TIP If you answered NO to 3 or more questions in Section E, the tool isn't ready — or you aren't ready for it yet.

Your readiness, scored — and your next move.
SCORE ROLLUP

Section totals carry over automatically from your scoring pages

SECTION	MAX PTS	YOUR SCORE	KEY OBSERVATION
A — Business Readiness	10	<input type="text"/>	<input type="text"/>
B — Data & Process Readiness	10	<input type="text"/>	<input type="text"/>
C — Team Readiness	10	<input type="text"/>	<input type="text"/>
D — Risk & Compliance	10	<input type="text"/>	<input type="text"/>
E — Vendor & Tool Evaluation	20	<input type="text"/>	<input type="text"/>
TOTAL READINESS SCORE		<input type="text"/>	<input type="text"/>
max 60		of 60	

YOUR AI READINESS LEVEL

- 49–60** **82%+** **HIGH-VALUE OPPORTUNITY**
 Foundation, clear use case, team capacity — start with your top Opportunity Map function; run a 30-day pilot.
- 37–48** **62–81%** **READY TO PILOT**
 Ready with gaps to manage — fix your lowest section, then launch a pilot with clear 30-day success criteria.
- 25–36** **42–61%** **BUILD FOUNDATION FIRST**
 AI underdelivers until process/data/team improve — build a 60-day plan for your 2 lowest sections.
- <25** **<42%** **NOT YET READY**
 Investing now wastes money and frustrates the team — document processes, organize data, revisit in 6 months.

YOUR NEXT ACTION

- PILOT ONE TOOL** Score 49+ — start with your top Opportunity Map priority
- FIX ONE SECTION** Score 37–48 — address your lowest section; 30-day item
- BUILD FOUNDATION** Score 25–36 — document top 2 processes; organize data
- WAIT & PREPARE** Score <25 — operations fundamentals; re-assess in 6 months

SIGN-OFF

Completed by

Reviewed by

Date

NEXT → Ready to evaluate a specific AI tool?

 Run it through the 7-Step Tech Decision Series — begin with Step 1 (Business Case) and Step 2 (TCO Calculator). bizhealth.ai/biztools/technology