

Small Business AI Readiness Checklist

A practical guide to finding where your operations are bleeding time and money — and where AI will move the needle.

01 Operations Audit

Map the workflows eating your team's time.

Check each item that applies to your business right now:

- Your team spends 5+ hours/week on manual data entry across spreadsheets or systems
- Customer inquiries sit unanswered for more than 2 hours during business hours
- Invoicing or billing requires manual input and follow-up every cycle
- Your onboarding process for new clients takes more than 3 touchpoints
- Weekly reports are assembled manually from multiple sources
- Scheduling (meetings, jobs, deliveries) involves back-and-forth emails or calls
- Lead follow-up depends on someone remembering to send the next email
- You have SOPs that live in people's heads instead of documented systems
- Employee time tracking is done on paper, texts, or spreadsheets
- You spend time each week reconciling data between tools that don't sync

SCORING

6+ checked? Your operations have significant automation potential. 3-5 checked? There are quick wins available. Under 3? You may be further along than most — but the scorecard on the next page will tell you more.

02

AI Readiness Scorecard

Rate your business across 6 dimensions (1-5 scale).

Data Maturity

 1 2 3 4 5

Is your business data organized, digital, and accessible? Or scattered across emails, paper, and personal drives?

Process Documentation

 1 2 3 4 5

Are your key workflows documented? Could someone new follow them without hand-holding?

Tech Stack Integration

 1 2 3 4 5

Do your current tools (CRM, email, accounting) connect to each other? Or are they isolated silos?

Team Capacity

 1 2 3 4 5

Does your team have the bandwidth to adopt new tools? Or are they already stretched thin?

Leadership Buy-In

 1 2 3 4 5

Is decision-making leadership open to AI and automation? Or skeptical and risk-averse?

Budget Readiness

 1 2 3 4 5

Is there budget allocated (or allocatable) for operational improvements this quarter?

YOUR TOTAL SCORE

____ / 30

26-30: AI-ready 18-24: Some gaps Under 18: Foundation work needed

03 ROI Prioritization Matrix

Rank your automation candidates by impact and effort.

List 3-5 processes from your Operations Audit. Rate each on two dimensions:

Process / Task	Time Saved (hrs/wk)	Complexity (1-5)	Priority (H/M/L)

HOW TO PRIORITIZE

High time savings + Low complexity = Do this first. These are your quick wins. High time savings + High complexity = Plan for Month 2-3. Worth it, but needs architecture. Low time savings + High complexity = Skip it (for now). Don't over-engineer marginal gains.

04

90-Day Implementation Roadmap

Your week-by-week action plan for AI integration.

WEEKS 1-2: FOUNDATION

- Complete this checklist and scorecard with your leadership team
- Document your top 3 time-consuming workflows step by step
- Audit your current tech stack — list every tool and what it connects to
- Set a baseline: track hours spent on manual tasks this week
- Identify one 'quick win' automation you can test immediately

WEEKS 3-4: QUICK WINS

- Implement your first automation (email sequences, form routing, or data sync)
- Set up a CRM if you don't have one (HubSpot Free is a solid start)
- Connect your top 3 tools using Zapier, Make, or n8n
- Create a shared dashboard for your key business metrics
- Train your team on any new tools — keep it to 15 minutes max

WEEKS 5-8: BUILD

- Roll out automation for your highest-priority process from the matrix
- Implement AI-assisted customer communication (chatbot, email drafts, FAQ)
- Build automated reporting — weekly KPI emails that write themselves
- Document new workflows so the team isn't dependent on one person
- Measure: compare hours spent vs. your Week 1 baseline

WEEKS 9-12: SCALE

- Tackle your second-priority automation from the matrix
- Review and optimize automations from Weeks 3-8 — what broke? What's slow?
- Explore AI for strategic work: market analysis, pricing, forecasting
- Calculate actual ROI: hours saved, costs reduced, revenue impact
- Plan your next quarter — what's the next level of automation look like?

05 What Happens Next

You've done the hard part. Here's how to act on it.

1 Complete the checklist

Block 30 minutes. Go through each section honestly. The value is in the gaps you find, not in checking every box.

2 Share it with your team

Your operations manager, office admin, or whoever touches the day-to-day workflows — they'll spot things you miss.

3 Pick your first win

Choose the automation with the highest ROI from your prioritization matrix. Start there. Don't try to do everything at once.

4 Book a free AI audit

Want an expert eye? We'll spend 30 minutes on a call walking through your checklist results and showing you exactly where the leverage is. No pitch, no pressure — just clarity.

Ready to move faster?

Book a free 30-minute AI audit at naveron.ai/contact

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