

2026

AI Readiness Checklist

Is Your Business Ready?

AI Readiness Checklist

This checklist is about taking an honest look at how your business operates today and not about tools, trends, or quick wins. It is designed to help identify where AI and automation could realistically add value in the future.

The goal of this checklist is to spark thoughtful conversation within your company. It's designed to help you assess your current processes, systems, data, and team readiness before investing time or money into AI solutions. There are no right or wrong answers, just insights that clarify where you are now and what gaps may need attention.

Use this as a discussion guide with leadership or key team members. The more candid the conversation, the more useful the outcomes will be. AI works best when it supports strong foundations, not when it's used to paper over unresolved issues.

How to use the Checklist

Work through it as a group: Involve leadership and team members who understand day-to-day operations. Different perspectives surface better insights.

Answer honestly, not optimistically: This isn't a scorecard. The value comes from identifying gaps, not checking boxes.

Focus on patterns, not perfection: Pay attention to sections where multiple items are unclear or unchecked, those areas usually matter most.

Start conversations, not implementations: The goal is understanding where you are today, not rushing into AI tools or automation.

Use it as a baseline: Revisit this checklist as your processes, tools, and team evolve. AI readiness changes over time.

Stage 1: Business Clarity

- We understand our biggest operational pain points.**
Example: too much manual work, slow response times, missed leads, reporting delays.
- We know which tasks are repetitive, time-consuming, or error-prone.**
AI and automation shine here. If everything feels “custom,” start documenting patterns.
- We have clear business goals for the next 6–12 months.**
Growth, efficiency, cost reduction, customer experience. AI should support a goal, not create one.
- We’re not looking for AI to “fix everything”.**
AI works best as an assistant, not a replacement for strategy or leadership.

Stage 2: Process & Workflow Readiness

- Our core processes are documented (even roughly).**
If only one person knows how something works, automation will struggle.
- We can describe our workflows step-by-step.**
Example: lead comes in → follow-up → qualification → handoff → close.
- We know where bottlenecks or delays occur.**
These are prime automation candidates.
- We’re open to improving or changing workflows before automating them.**
Automating a broken process just makes problems happen faster.

Stage 3: Data & Systems Check

- We know what tools we currently use.**
CRM, email, accounting, project management, customer support, etc.
- Our data is mostly accurate and accessible.**
AI relies on good inputs. Messy data = messy results.
- We understand where our data lives and who owns it.**
Scattered data creates friction for automation.
- We're comfortable connecting systems together.**
Most AI value comes from integration, not standalone tools.

Stage 4: Team & Culture Readiness

- Leadership is aligned on exploring AI responsibly.**
Internal resistance can derail even the best tools.
- Our team understands AI is meant to assist, not replace them.**
Adoption improves when fear is removed.
- We have someone internally who can “own” AI initiatives.**
They don't have to be technical, just accountable.
- We're open to training and change management.**
AI adoption is as much about people as technology.

Stage 5: Risk, Trust & Governance Considerations

- We've discussed data privacy and security concerns.**
Especially important for customer data.
- We understand that AI outputs should be reviewed, not blindly trusted.**
Human oversight matters.
- We're realistic about limitations and accuracy.**
AI is probabilistic, not perfect.
- We're comfortable starting small and scaling responsibly.**
Granular → Incremental → Rollout

Stage 6: Budget & Expectations

- We have a rough budget range in mind.**
AI can be affordable and cost effective, but clarity prevents surprises.
- We understand ROI may come from time saved, not just revenue gained.**
Efficiency is often the first win.
- We're patient enough to iterate and improve over time.**
The best AI systems evolve.
- We value guidance and strategy, not just tool setup.**
Tools without context rarely deliver long-term value.

Let's Discuss the Results

Once you've completed the self-assessment, let's schedule a time to discuss the checklist together to identify automation opportunities. Below is a list of areas we can help.

AI Readiness & Opportunity Audits

Assessment of existing systems, workflows, and business processes to identify where AI and automation can deliver real efficiency and cost savings.

Workflow & Process Automation

Design and implementation of automated workflows that reduce manual work, eliminate bottlenecks, and improve operational consistency.

AI Tool Evaluation & Selection

Guidance on selecting the right AI and automation tools based on your business goals, technical environment, and budget.

AI Agents & Task Automation

Development of AI-driven agents to handle repetitive tasks, information routing, and operational support across teams

CRM & Marketing Automation

Integration of AI and automation into CRM, email, and marketing systems to improve lead handling, follow-ups, and customer lifecycle management.

Engagement & Support Automation

Implementation of AI chatbots and automated support workflows for handling FAQs, routing inquiries, and improving response times.

Internal Knowledge & AI Assistants

Creation of internal AI assistants that help teams access documentation, policies, and institutional knowledge more efficiently.

Data Migration & Reporting Automation

Automation of data collection, cleanup, enrichment, and reporting to support better decision-making without manual effort.