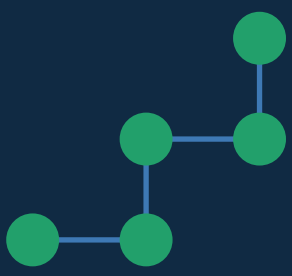
AI READINESS ASSESSMENT

Is Your Business Actually Ready for AI Automation?

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A practical workflow assessment for small business owners who want AI to reduce work - not automate confusion.



START HERE

AI is not the first step.

When a workflow is unclear, inconsistent, or dependent on decisions nobody has defined, adding AI rarely fixes the underlying problem. It can simply make the same confusion move faster.

The best automation candidates are usually repeatable processes with clear inputs, clear ownership, predictable decisions, and a measurable outcome.

THE PRINCIPLE

Simplify the process. Document the process. Assign ownership. Then decide where AI can assist.

How to use this assessment

Choose one workflow - for example lead follow-up, content preparation, customer enquiry handling, meeting summaries, quotation drafting, or weekly reporting. Score that workflow, not your entire business.

SCORING

For each statement: 0 = No / rarely 1 = Partly / sometimes 2 = Yes / consistently.

SECTION 01

Process clarity

Before AI can follow or assist a workflow, the workflow itself should be understandable.

#	ASSESSMENT STATEMENT	0	1	2
1	The workflow has a clear starting point and end result.	☐	☐	☐
2	The main steps can be explained in a simple sequence.	☐	☐	☐
3	People do not regularly invent a different process each time.	☐	☐	☐
4	Common exceptions are known and can be described.	☐	☐	☐
5	We know which steps create unnecessary delay or duplication.	☐	☐	☐

SECTION SCORE

Process clarity: _____ / 10

Quick diagnostic

If you cannot explain the workflow on one page, map and simplify it before trying to automate it.

SECTION 02

Ownership & decision rules

#	ASSESSMENT STATEMENT	0	1	2
1	One person is clearly accountable for the outcome.	☐	☐	☐
2	It is clear who approves, reviews, or escalates exceptions.	☐	☐	☐
3	Routine decisions follow reasonably consistent rules.	☐	☐	☐
4	We can distinguish decisions AI may assist from decisions a human must make.	☐	☐	☐
5	Someone will remain responsible for checking the automated output.	☐	☐	☐

SECTION SCORE

Ownership & decision rules: _____ / 10

WATCH FOR THIS

If nobody owns the workflow today, automation can create faster handoffs without creating accountability.

SECTION 03

Inputs, data & information

#	ASSESSMENT STATEMENT	0	1	2
1	The information needed to do the task is usually available.	☐	☐	☐
2	Inputs arrive in reasonably consistent formats or can be standardized.	☐	☐	☐
3	Important source information is accurate enough to rely on.	☐	☐	☐
4	We know what information is sensitive or should not be shared with an AI system.	☐	☐	☐
5	There is a reliable place to retrieve the latest approved information.	☐	☐	☐

SECTION SCORE

Inputs, data & information: _____ / 10

Why this matters

AI cannot reliably compensate for missing context, contradictory source material, or poor information hygiene. Clean inputs are often a better first investment than a more advanced tool.

SECTION 04

Repeatability & value

#	ASSESSMENT STATEMENT	0	1	2
1	The workflow happens frequently enough to justify improvement.	☐	☐	☐
2	A meaningful portion of the work is repetitive preparation, drafting, sorting, summarizing, or extraction.	☐	☐	☐
3	The workflow consumes noticeable owner or staff time.	☐	☐	☐
4	Faster completion would improve customer service, capacity, or revenue.	☐	☐	☐
5	The task can be broken into bounded steps rather than requiring open-ended judgment throughout.	☐	☐	☐

SECTION SCORE

Repeatability & value: _____ / 10

GOOD EARLY CANDIDATES

Meeting summaries, first drafts, enquiry classification, task extraction, recurring report preparation, FAQ drafting, content repurposing, and structured research preparation.

SECTION 05

Risk, quality & human control

#	ASSESSMENT STATEMENT	0	1	2
1	Errors in this workflow can be detected before they cause serious harm.	☐	☐	☐
2	A human review step can be retained where quality or judgment matters.	☐	☐	☐
3	We can define what AI must never decide or send automatically.	☐	☐	☐
4	The workflow does not require AI to make high-stakes promises or unsupported claims.	☐	☐	☐
5	We have a fallback process if the automation fails or produces a poor output.	☐	☐	☐

SECTION SCORE

Risk, quality & human control: _____ / 10

KEEP HUMAN CONTROL

Pricing exceptions, legal or financial commitments, sensitive customer situations, final strategic decisions, and anything where accountability cannot be delegated should retain appropriate human review.

SECTION 06

Measurement & implementation

#	ASSESSMENT STATEMENT	0	1	2
1	We know what 'better' means for this workflow.	☐	☐	☐
2	We can measure at least one useful outcome: time, errors, response speed, conversion, cost, or quality.	☐	☐	☐
3	We can test the automation on a small scale before wider use.	☐	☐	☐
4	The people using the workflow can give feedback and improve it.	☐	☐	☐
5	We are willing to change the process rather than force AI into the current way of working.	☐	☐	☐

SECTION SCORE

Measurement & implementation: _____ / 10

Total your score

TOTAL SCORE

Add all six sections: _____ / 60

YOUR RESULT

What your score means

45-60	READY FOR A CONTROLLED AI PILOT The workflow appears structured enough to test AI assistance. Start with one bounded use case, retain review, measure the result, and improve before expanding.
30-44	SIMPLIFY FIRST There is useful automation potential, but one or more foundations need work. Focus on your lowest-scoring sections before selecting more tools.
0-29	NOT YET READY Automating now may add complexity. Clarify the process, inputs, ownership, and controls first. A simpler workflow will make later AI adoption easier and safer.

Do not rely on the total alone

A high overall score can hide one critical weakness. If Risk, quality & human control or Inputs, data & information scores below 6/10, address that weakness before expanding automation.

ACTION PLAN

Turn the assessment into your next step

Workflow assessed: _____

1. Lowest-scoring section

_____

2. One process problem to simplify

_____

3. One step to document

_____

4. Who owns the outcome?

_____

5. One bounded task AI could assist

_____

6. Human review point

_____

7. Success metric

_____

PILOT CHECKLIST

Before you switch anything on

☐ We are automating a defined problem, not buying AI because it is fashionable.

☐ The existing workflow has been simplified where possible.

☐ The source information and inputs are clear.

☐ The AI's role is bounded and specific.

☐ A human remains accountable for the outcome.

☐ Sensitive information and permissions have been considered.

☐ We know when a human must review, approve, or take over.

☐ We have defined a small pilot group or limited use case.

☐ We know what metric will tell us whether the pilot worked.

☐ We will review the process after the pilot instead of assuming automation is finished.

THE SIMPLE RULE

Do not automate chaos. Make the work clearer first. Then use AI where it can remove repetitive effort while leaving judgment and accountability with people.

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Practical AI adoption for small businesses - focused on useful workflows, clear processes, and responsible human control.