

The Business Owner's AI Readiness Checklist

A self-assessment to help you determine if your business is ready to integrate AI, and where to focus first.

Not every business is ready for AI, and that is perfectly fine. The worst thing you can do is invest in tools your team is not prepared to use. This checklist helps you honestly assess where you stand across five key areas. Answer each item, tally your score, and see where you land.

Be honest. This is for you, not for a vendor pitch.

Section 1: Process Maturity

Are your operations ready for automation?

Our core business processes are documented and standardized.

If different people do the same task differently, AI will not fix that. It will make it worse.

We can identify at least three repetitive tasks that take significant time each week.

These are your automation candidates. If you cannot name them, you are not ready to automate.

Our current workflows have clear inputs and outputs.

AI needs structured handoffs. If your process depends on tribal knowledge, document it first.

We have dealt with most manual workarounds in our key processes.

Workarounds are red flags. Every one you automate becomes a permanent, scaled problem.

Section 2: Data Readiness

Do you have the data AI needs to deliver results?

Our business data is stored in organized, accessible systems.

Spreadsheets, CRMs, databases. If your data lives in email threads and sticky notes, start there.

] We have at least 6 months of historical data for key processes.

AI learns from patterns. Without enough data, it is guessing, not analyzing.

] Our data is reasonably clean and consistent.

Duplicate records, missing fields, and inconsistent formats will undermine any AI tool.

] We know where our sensitive data lives and who has access.

Before AI touches your data, you need to know what it is touching and what the risks are.

Section 3: Team Readiness

Is your team prepared to adopt new tools?

] Our team is comfortable with the software tools we currently use.

If your team struggles with existing tools, adding AI will create more friction, not less.

] We have at least one person who could champion an AI rollout.

Not a technical expert. Someone who understands the workflow and can drive adoption.

] Our leadership is aligned on why we would use AI.

If leadership sees AI as a cost center or a gimmick, adoption will stall.

] Our team is open to changing how they work.

Change resistance is the top killer of AI projects. Gauge this honestly before you start.

Section 4: Budget and Expectations

Are you investing with realistic expectations?

] We have a defined budget for AI tools and implementation.

The tool is only part of the cost. Factor in integration, training, and ongoing optimization.

] We understand that AI delivers incremental improvement, not overnight transformation.

The ROI is real, but it builds over time. If you expect magic in 30 days, recalibrate.

] We are prepared to invest time in training and onboarding.

Most AI tools need 30 to 90 days of active adoption before they deliver consistent value.

] We have identified a specific KPI or metric we want AI to improve.

Without a target, you cannot measure success. Define the metric before you buy the tool.

Section 5: Security and Compliance

Are you prepared to handle the risk side of AI?

We understand our industry's data handling and privacy requirements.

HIPAA, SOC 2, GDPR. Know your obligations before any AI tool touches your data.

We have a process for vetting new software vendors.

AI vendors should meet the same security and compliance standards as any other vendor.

We know the difference between on-premise, cloud, and hybrid AI deployment.

Where your data is processed matters. Make sure you choose the right model for your risk profile.

We are comfortable asking vendors hard questions about data usage.

If a vendor cannot clearly explain what happens to your data, that is your answer.

Your Score

Count the number of items you checked. Each checked item is worth 1 point. Maximum score: 20.

16 to 20: You are ready.

Your business has the foundation to implement AI effectively. The next step is identifying the right tools and building an integration plan. This is where a partner like Propel Tech can accelerate your timeline.

11 to 15: You are close.

You have solid fundamentals but some gaps to address. Focus on the sections where you had the fewest checks. A short engagement to clean up processes or data could have you ready within 30 to 60 days.

6 to 10: You have work to do first.

AI will not deliver results until you strengthen your foundation. That is not a bad thing. It means the smartest investment right now is in process documentation, data cleanup, and team alignment. Do that first, then come back to AI.

0 to 5: Start with the basics.

Your business will benefit more from operational improvements than AI tools right now. Focus on documenting processes, organizing data, and building team alignment around your current tools. AI will be there when you are ready.

Wherever You Scored, We Can Help.

Whether you are ready to implement or need help getting there, Propel Tech meets you where you are. Book a free consultation and we will walk through your results together.

Book a Free AI Consultation

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