



AI & Business Strategy Audit Form

For Small Businesses • Coaches • Pastors • Ministry Leaders • Entrepreneurs

GENERAL INFORMATION

Name: _____

Organization/Business/Ministry Name: _____

Email: _____

Phone: _____

Website (if applicable): _____

Industry/Type of Work: _____

How long have you been operating?

☐ Less than 1 year

☐ 1–3 years

☐ 3–7 years

☐ 7+ years

IDENTITY & CLARITY

Mission + Message

What is your mission in one sentence? _____

Who do you serve?

What problem do you solve for people?

Rate your clarity in describing what you do:

☐ Very clear

☐ Needs improvement

☐ Somewhat clear

☐ Not clear



OPERATIONS & SYSTEMS

Internal Systems

What systems do you currently use for:

Email: _____

Forms / Intake: _____

Scheduling: _____

File Management: _____

Team Communication: _____

Project Management: _____

Operational Strength

Rate how organized your business/ministry feels:

- | | |
|--|---|
| <input type="checkbox"/> Very organized | <input type="checkbox"/> Somewhat organized |
| <input type="checkbox"/> Needs improvement | <input type="checkbox"/> Chaotic / Hard to manage |

Automations Currently Used

- | | |
|--|--|
| <input type="checkbox"/> Email automation | <input type="checkbox"/> Appointment reminders |
| <input type="checkbox"/> Social media scheduling | <input type="checkbox"/> CRM workflows |
| <input type="checkbox"/> Lead nurturing | <input type="checkbox"/> None yet |

AI READINESS ASSESSMENT

Your AI Skill Level

- | | |
|--|--|
| <input type="checkbox"/> Beginner – I don't really know where to start | <input type="checkbox"/> Intermediate – I use AI sometimes |
| <input type="checkbox"/> Advanced – I use AI in many areas | <input type="checkbox"/> Not sure |

How are you currently using AI? *(check all that apply)*

- | | |
|---|---|
| <input type="checkbox"/> Content creation <i>(posts, emails, sermons, lessons, blogs)</i> | <input type="checkbox"/> Research |
| <input type="checkbox"/> Business planning or brainstorming | <input type="checkbox"/> Automation workflows |
| <input type="checkbox"/> Customer support responses | <input type="checkbox"/> Graphic design |
| <input type="checkbox"/> Sermon prep / Bible study support | <input type="checkbox"/> I'm not using AI yet |



Where do you WANT to use AI but don't know how?

- | | | |
|---|---|--|
| <input type="checkbox"/> Marketing | <input type="checkbox"/> Website building | <input type="checkbox"/> Customer Service |
| <input type="checkbox"/> Online course creation | <input type="checkbox"/> Graphic design | <input type="checkbox"/> Automation |
| <input type="checkbox"/> Lead generation | <input type="checkbox"/> Administrative tasks | <input type="checkbox"/> Writing / editing |
| <input type="checkbox"/> Sermon writing / lesson planning | <input type="checkbox"/> Everything | |

MARKETING & ONLINE PRESENCE

Social Media

Which platforms are you USING?

- | | | |
|-----------------------------------|------------------------------------|----------------------------------|
| <input type="checkbox"/> Facebook | <input type="checkbox"/> Instagram | <input type="checkbox"/> YouTube |
| <input type="checkbox"/> TikTok | <input type="checkbox"/> LinkedIn | <input type="checkbox"/> None |

Which platforms are WORKING for you?

Website Audit

Do you currently have a website? ☐ Yes ☐ No

If yes, rate its effectiveness:

- ☐ Strong – clear, updated, converts well
☐ Average – outdated or missing key elements
☐ Poor – unclear, confusing, or not functioning
☐ No website

Email List

Do you have an email list? ☐ Yes ☐ No

If yes, how many subscribers? _____

Do you email them consistently? ☐ Yes ☐ No



PRODUCT / OFFER CLARITY

What do you offer? *(check all that apply)*

- | | | |
|---|---|---------------------------------------|
| <input type="checkbox"/> Coaching programs | <input type="checkbox"/> Books / Digital products | <input type="checkbox"/> Services |
| <input type="checkbox"/> Sermons / Ministry resources | <input type="checkbox"/> Consulting | <input type="checkbox"/> Courses |
| <input type="checkbox"/> Merch / Physical products | <input type="checkbox"/> Events / Retreats | <input type="checkbox"/> Other: _____ |

Are your prices clearly defined?

- ☐ Yes ☐ No ☐ Somewhat

Do people understand your offer immediately?

- ☐ Yes ☐ No ☐ Sometimes

CUSTOMER/CLIENT EXPERIENCE

How do clients/customers find you?

- | | | |
|---------------------------------------|--|-----------------------------------|
| <input type="checkbox"/> Social media | <input type="checkbox"/> Word-of-mouth | <input type="checkbox"/> Website |
| <input type="checkbox"/> Events | <input type="checkbox"/> Paid ads | <input type="checkbox"/> Not sure |

Do you have a follow-up process? ☐ Yes ☐ No ☐ Needs improvement

Biggest struggle in serving clients right now:

- | | | |
|---|---|---|
| <input type="checkbox"/> Too many tasks | <input type="checkbox"/> Not enough clients | <input type="checkbox"/> No automation |
| <input type="checkbox"/> Not enough clarity | <input type="checkbox"/> Lack of time | <input type="checkbox"/> Systems not in place |
| <input type="checkbox"/> I'm doing too much alone | <input type="checkbox"/> Other: _____ | |

LEADERSHIP & TEAM READINESS

Do you have a team? ☐ Yes ☐ No

Team members currently supporting you with:

- | | | |
|--|------------------------------------|---|
| <input type="checkbox"/> Admin tasks | <input type="checkbox"/> Marketing | <input type="checkbox"/> Tech / Website |
| <input type="checkbox"/> Finance | <input type="checkbox"/> Content | <input type="checkbox"/> Ministry support |
| <input type="checkbox"/> None – I'm doing everything | | |



Do you want AI to help reduce team workload?

☐ Yes

☐ No

☐ Not sure

GOALS & CHALLENGES

What are your top THREE goals in the next 6–12 months?

GOAL 1

GOAL 2

GOAL 3

What are your biggest challenges right now? *(choose up to 5)*

☐ Time management

☐ Low revenue

☐ Marketing weakness

☐ Ministry overload

☐ Other: _____

☐ No automation

☐ No leads

☐ System chaos

☐ Team support

☐ Lack of clarity

☐ Tech confusion

☐ Burnout

☐ Sermon prep strain



AI TRANSFORMATION PRIORITY

What areas do you MOST want KIS to help you transform? *(check all that apply)*

- | | |
|--|--|
| <input type="checkbox"/> Build/repair your digital systems | <input type="checkbox"/> Create automations |
| <input type="checkbox"/> Build marketing content | <input type="checkbox"/> Create a full funnel |
| <input type="checkbox"/> Website creation or improvement | <input type="checkbox"/> Email marketing strategy |
| <input type="checkbox"/> AI training for your team | <input type="checkbox"/> Sermon + ministry automation |
| <input type="checkbox"/> Business operations setup | <input type="checkbox"/> Branding + messaging |
| <input type="checkbox"/> Workflow organization | <input type="checkbox"/> Everything – I need a full overhaul |

What is your preferred pace?

- | | |
|---|--|
| <input type="checkbox"/> Quick wins (30 days) | <input type="checkbox"/> Moderate build (60–90 days) |
| <input type="checkbox"/> Full transformation (3–6 months) | <input type="checkbox"/> Ongoing support |

BUDGET & DECISION READINESS

This helps you tier them into your packages.

Which level of support are you considering?

- | | |
|---|--|
| <input type="checkbox"/> Starter Setup (\$297–\$497) | <input type="checkbox"/> Full Buildout (\$1,000–\$2,500) |
| <input type="checkbox"/> Premium + Automation (\$3,500–\$7,500) | <input type="checkbox"/> Monthly Support Membership |
| <input type="checkbox"/> Not sure – need guidance | |

FINAL QUESTION

If we could fix just ONE thing for you in the next 30 days, what would make the biggest impact?