



## 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       Somewhat clear  
 Needs improvement       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 (posts, emails, sermons, lessons, blogs)	<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?

- Marketing
- Online course creation
- Lead generation
- Sermon writing / lesson planning
- Website building
- Graphic design
- Administrative tasks
- Everything
- Customer Service
- Automation
- Writing / editing

## MARKETING & ONLINE PRESENCE

### Social Media

Which platforms are you **USING**?

- Facebook
- TikTok
- Instagram
- LinkedIn
- YouTube
- 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

## CUSTOM/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)

<input type="checkbox"/> Time management	<input type="checkbox"/> No automation	<input type="checkbox"/> Lack of clarity
<input type="checkbox"/> Low revenue	<input type="checkbox"/> No leads	<input type="checkbox"/> Tech confusion
<input type="checkbox"/> Marketing weakness	<input type="checkbox"/> System chaos	<input type="checkbox"/> Burnout
<input type="checkbox"/> Ministry overload	<input type="checkbox"/> Team support	<input type="checkbox"/> Sermon prep strain
<input type="checkbox"/> Other: _____		



## AI TRANSFORMATION PRIORITY

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

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

**What is your preferred pace?**

- Quick wins (30 days)
- Full transformation (3–6 months)
- Moderate build (60–90 days)
- Ongoing support

## BUDGET & DECISION READINESS

*This helps you tier them into your packages.*

**Which level of support are you considering?**

- Starter Setup (\$297–\$497)
- Premium + Automation (\$3,500–\$7,500)
- Not sure – need guidance
- Full Buildout (\$1,000–\$2,500)
- Monthly Support Membership

## FINAL QUESTION

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