

10 Smart Steps to Prepare Your Business for AI

AI isn't coming, it's already here. Thousands of tools exist to reduce error rates, eliminate repetitive tasks, and drive data-informed decisions. But throwing tech at a problem without strategy leads to costly chaos. At Peak Fractional, here's how we help businesses evaluate and implement AI the right way:

1. Evaluate Each Work Center for AI Readiness

Start with the basics: Where are the bottlenecks, manual tasks, repetitive work, or high error rates? Which teams are drowning in data or forced to make decisions too quickly? These are the first areas ripe for AI.

2. Assess Your Talent Bench

AI won't replace jobs—but it will expose skills gaps. Evaluate your team's readiness. Who's adaptable? Who needs training? Upskilling now will save you 10x in the long run.

3. Audit Current AI Usage

What's your team already using? ChatGPT? Excel macros? Marketing automations? Narrow AI tools (like ChatGPT) can be helpful but also inaccurate. Understand the limits and risks of what's already in play.

4. Map Workflow Bottlenecks Across Teams

AI tools must fit your real workflow. Map how departments interact and where integration gaps live. Knowing this will guide whether you need off-the-shelf solutions or something custom.

5. Assess Data Quality

Bad data = bad AI. Before you integrate any tools, assess the health of your data. You can't automate garbage. Clean it first.

6. Source Tool Options

Start exploring! Look for 2–3 AI solutions per department based on the challenges from Step 1. Include general productivity tools and industry-specific options.

7. Match Tools to Workflow, Budget & Culture

Make sure each tool aligns with your operations, tech stack, culture, and budget. Check dependencies—some apps don't integrate well with others (ERPs are common culprits).



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8. Build Your Execution Roadmap

This is where strategy meets reality. Plan resource allocation, data cleanup, timeline development, and internal communication. Avoid launching during peak business periods.

9. Deploy a Cross-Functional Implementation Team

Assign owners for rollout, testing, tracking, and documentation. Celebrate time savings and cost wins along the way to boost morale.

10. Drive Adoption and Find New Growth Opportunities

Train your team. Build internal champions. Reinforce use through leadership. Then, reinvest that freed-up time into innovation, revenue, and margin.

Feeling overwhelmed or stuck?

Reach out to our team and speak to an expert!



Email our Client Service team at CS@PeakFractional.com or call/text (619)894-9008