🚀 AI Readiness Checklist: SMB Edition

1. Strategy & Use Case (The "Why")

"Before touching the tech, define the business goal. AI is a tool, not a strategy."- Suzanne Medes

[ ] Identify Pain Points: Have you listed 3 repetitive, time-consuming tasks (e.g., customer support FAQs, data entry, email drafting)?
[ ] Define Success Metrics: Do you know what "better" looks like? (e.g., "Reduce response time by 30%" vs. "Use AI because it's cool").
[ ] Cost-Benefit Reality Check: Have you weighed the subscription costs ($20–$30/user/month) against the estimated hours saved?

2. Data Health (The "Fuel")

"AI is only as smart as the information you give it using the right words." – WORD MECCA

[ ] Centralized Data: Is your company data scattered across personal desktops, or is it in a searchable cloud environment (SharePoint, Google Drive, CRM)?
[ ] Data Cleanliness: Is your customer and financial data up-to-date and free of massive duplicates?
[ ] Access Control: Can you restrict AI so it doesn't accidentally "read" sensitive HR files or executive payroll?

3. Governance & Safety (The "Guardrails")

"Protect your reputation and your intellectual property with documentation." – WORD MECCA

[ ] Acceptable Use Policy: Do employees know what they cannot put into public AI (e.g., trade secrets, client names)?
[ ] Fact-Checking Protocol: Is there a "Human-in-the-Loop" rule where a person must verify AI-generated output before it reaches a client?
[ ] Privacy Compliance: Does your AI usage align with your industry's regulations (HIPAA, GDPR, CCPA)?

4. People & Culture (The "Engine")

"Tools only work if people actually use them and aren't afraid of them." – Suzanne Medes

[ ] **Internal "AI Champion":** Have you designated one person (or a small committee) to lead the charge and answer questions?
[ ] **Basic Literacy Training:** Has the staff been shown how to write effective "prompts" to get the best results?
[ ] **Psychological Safety:** Have you communicated that AI is an *assistant* to augment roles, not a replacement for the workforce?