



## AI 4 Business

### AI Agent Readiness Assessment for Discovery Calls

#### Purpose

This assessment helps determine whether your business has the operational foundation required to deploy AI agents successfully.

It is built to diagnose readiness in five areas:

1. **Knowledge Base Readiness**
2. **SOP and Workflow Readiness**
3. **Systems and Tool Readiness**
4. **Decision and Governance Readiness**
5. **Implementation Readiness**

The core principle is simple:

**AI agents perform best when the business already has structured knowledge, repeatable SOPs, clear decision rules, and connected systems.** Without that, the agent does not become intelligent. It becomes expensive confusion with a login.

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# Readiness Scoring Model

Score each question from **0 to 3**:

- **0 = Not in place**
- **1 = Partially in place / inconsistent**
- **2 = Mostly in place / usable with cleanup**
- **3 = Fully in place / well documented and ready**

## Section 1: Business Clarity and Use Case Readiness

### Questions

1. What are the top 3 repetitive tasks your team handles every week?
  2. Which of those tasks are high-volume and rule-based?
  3. Which tasks consume the most staff time?
  4. Which customer-facing processes need faster response time?
  5. Which internal processes break most often?
  6. Do you already know the first workflow you want to automate?
  7. Can you describe the current process from trigger to completion?
  8. Do you know what a successful result would look like?
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## Section 2: Knowledge Base Readiness

### Questions

1. Do you have a central location for key business documents?
2. Are your service descriptions documented?
3. Do you have a Business Plan or Strategy Plan?
4. Do you have current pricing documents?
5. Do you have FAQs written down?
6. Do you have onboarding documents or checklists?
7. Do you have scripts, templates, email responses, or call notes that reflect how your team communicates?
8. Are your policies, offers, and process documents current (SOP's)?
9. Is your knowledge scattered across inboxes, people, and old files?
10. Do multiple team members give different answers to the same question?
11. Is there a clear "source of truth" for operational information?

## Section 3: SOP and Workflow Readiness

### Objective

Assess whether your business has documented operating procedures that an AI agent can follow.

### Questions

1. Do you have written SOPs for your main workflows?
  2. Are your SOPs step-by-step or just broad descriptions?
  3. Are there clear triggers for when a workflow starts?
  4. Are the required inputs known for each workflow?
  5. Are decision points documented?
  6. Are escalation rules documented?
  7. Are outputs and handoffs defined?
  8. Do team members follow the same process consistently?
  9. Are exceptions documented?
  10. Have these processes been tested and refined over time?
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## Section 4: Data and System Readiness

### Objective

Assess whether your business's systems are structured enough to support AI workflow execution.

### Questions

1. Do you use a CRM?
2. Is your CRM actively maintained?
3. Are your customer records accurate?
4. Is your sales pipeline defined?
5. Do you use a shared calendar or booking system?
6. Are forms collecting structured data?
7. Are core documents stored digitally?
8. Are your systems integrated or siloed?
9. Do you already use automation tools like Zapier, Make, or similar?
10. Can your current systems expose the data an agent would need?

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## Section 5: Decision Logic Readiness

### Objective

Determine whether the business can define the rules an AI agent should follow.

Your framework explicitly calls for **goal definition, decision logic, boundary conditions, escalation rules, and performance metrics.**

### Questions

1. Can you define when the agent is allowed to act automatically?
2. Can you define when a human must approve the action?
3. Are there financial thresholds requiring approval?
4. Are there sensitive customer scenarios requiring escalation?
5. Can you define standard responses for common scenarios?
6. Are there clear qualification criteria for leads?
7. Are there clear disqualification criteria?
8. Do you know which decisions are rule-based versus judgment-based?
9. Can you define what the agent must never do?
10. Are there compliance, privacy, or brand constraints the agent must respect?

## Section 6: Team and Ownership Readiness

### Questions

1. Who owns this workflow today?
2. Who will own the AI workflow after implementation?
3. Who will maintain the knowledge base?
4. Who will review agent performance?
5. Who will approve process changes?
6. Is the team open to changing how work gets done?
7. Will the team adopt structured processes?
8. Is there internal resistance to AI or automation?
9. Can one decision-maker approve implementation?
10. Is there capacity for testing and feedback?

# **Section 7: Governance, Risk, and Quality Control Readiness**

## **Questions**

1. Are there any compliance or privacy risks in this workflow?
2. Does the workflow involve sensitive client data? (example: Credit Card information)
3. Are there financial or legal consequences if the agent makes a mistake?
4. Do you have approval checkpoints?
5. Do you have a way to review outputs?
6. Do you have an escalation path for errors?
7. Do you want logs or audit trails of AI actions?

# **Section 8: Content and Communication Readiness**

## **Questions**

1. Do you have a clearly defined brand voice?
2. Do you have approved messaging for offers and services?
3. Do you have standard email templates?
4. Do you have standard follow-up messages?
5. Do you have objection-handling language?
6. Do you have discovery call scripts?
7. Do you have onboarding email templates?
8. Are your offers described consistently across channels?
9. Can you define what the agent should say and avoid saying?
10. Are CTAs standardized?

# **Section 9: Measurement and ROI Readiness**

## **Questions**

1. What metric would define success for this workflow?
2. How much time does the current process take today?
3. What is the current response time?
4. What is the current conversion rate?
5. What is the current error or drop-off rate?
6. What is the approximate cost of the current manual process?
7. What would improved performance be worth financially?
8. Can you track lead-to-call or call-to-close improvements?