

Where to start? AI works best when your business is organized. To get the most out of your AI tools, you need to populate your Knowledge Base.

Is Your Business Ready for AI?

A Simple Checklist for Business Owners

Artificial Intelligence can help you save time, reduce costs, and grow your business.

But before AI can work properly, your business needs to have the right information organized.

Use this checklist to see if your business is ready.

Check each item that you already have in place.

1. Business Basics

- I have a clear **business plan or strategy**
 - I know my **ideal customer**
 - I know the **main problem my business solves**
 - I have clear **business goals for the next 12 months**
-

2. Products and Services

- My **products or services are clearly defined**
 - I have a **pricing list** for everything I sell
 - I have **sales proposals or quotes** I use with clients
 - I have **examples or case studies** of past work
-

3. Branding and Messaging

- I have **branding guidelines** (logo, colours, fonts)
 - I know how I want my business to **sound and communicate**
 - I have clear **marketing messages** for my business
 - I have **marketing materials** such as brochures or website content
-

4. Business Documents

- My important business documents are stored **in one place**
 - My files are **organized and up to date**
 - I keep **meeting notes or project notes**
 - I have documents that explain how my business works
-

5. Standard Operating Procedures (SOPs)

SOPs are step-by-step instructions for how work gets done.

- I have written steps for **how we deliver our services**
 - I have written steps for **how we bring on new clients**
 - I have written steps for **how we handle customer support**
 - I have written steps for **daily or weekly business tasks**
-

6. Customer Information

- I store customer information in a **CRM or database**
 - My customer information is **organized and updated**
 - I keep track of **sales conversations and client history**
-

7. Technology

- I use online tools to manage my business
 - My systems are **cloud-based** (Google Drive, Notion, CRM, etc.)
 - My tools can **connect or automate tasks**
-

Your AI Readiness Score

Give yourself **1 point for every box you checked.**

Total Score: _____

What Your Score Means

20–28 points

Your business is well organized and ready to start using AI.

12–19 points

Your business can benefit from AI, but some information needs to be organized first.

Below 12 points

Before implementing AI, your business should focus on organizing documents and processes.



Why This Matters

AI tools work best when they have **clear information to learn from**.

The more organized your business is, the more powerful AI becomes.

When your files, processes, and knowledge are structured, AI can help you:

- answer customer questions
 - create proposals
 - automate tasks
 - train employees
 - generate marketing content
 - scale your business faster
-

Want Help Preparing Your Business for AI?

If you want help organizing your systems and building an **AI-powered knowledge base for your business**, you can book an AI Readiness Consultation at ai-4business.ca.

During this session we will:

- review your AI readiness score
 - identify automation opportunities
 - design your AI implementation roadmap
-