AI & Automation Readiness Checklist

A practical assessment for small businesses deciding whether their processes, data, team and technology are ready for AI or automation. Use it to identify strong candidates, expose gaps and prioritize safer, higher-value implementation opportunities.

Business / Team	_____
Evaluator	_____
Process / Department	_____
Assessment date	_____

Scoring

0 = Not ready **1** = Early stage **2** = Developing **3** = Ready **4** = Strong foundation.

Score each statement based on your current state—not what you plan to have later. Use the Notes column to document gaps or required actions.

1. Process Readiness

Readiness statement	Score 0–4	Notes / gap
Process is clearly defined and understood by the people who perform it		
Steps occur in a reasonably consistent order		
Inputs and expected outputs can be identified		
Exceptions and edge cases are known		
Process occurs frequently enough to justify improvement		
Current process can be measured for time, volume, cost or error rate		
An owner is responsible for the process		

2. Automation Candidate Strength

Readiness statement	Score 0–4	Notes / gap
Work includes repetitive manual steps		
Rules or conditions can determine many routine decisions		
Clear triggers exist (form submitted, status changed, date reached, payment received, etc.)		
Actions can be defined after each trigger		
Manual copying/re-entry of information occurs		

Readiness statement	Score 0–4	Notes / gap
Delays commonly occur because someone must remember the next step		
Automation would reduce meaningful time, errors or response delays		

3. Data Readiness

Readiness statement	Score 0–4	Notes / gap
Required data is accessible		
Important fields are reasonably complete		
Data formats and naming are consistent enough to use		
Duplicate or outdated records are manageable		
Data sources are known		
Sensitive/confidential information has been identified		
Rules exist for who should access or modify important data		

4. Team & Ownership Readiness

Readiness statement	Score 0–4	Notes / gap
A business owner or manager sponsors the initiative		
A process owner can approve workflow decisions		
Staff understand why the change is being considered		
Training time can be allocated		
Someone will monitor results after launch		
Staff can report errors or unexpected behavior		
Human review can remain where judgment is necessary		

5. Technology & Integration Readiness

Readiness statement	Score 0–4	Notes / gap
Current core systems are known and documented		
Systems provide usable integrations, APIs, webhooks or export/import options where needed		
Login/access ownership is clear		
Required software subscriptions and plan limits are understood		

Readiness statement	Score 0–4	Notes / gap
Testing can occur without disrupting critical production work		
Data can move between required systems reliably		
A fallback/manual process can be used if automation fails		

6. AI-Specific Readiness

Readiness statement	Score 0–4	Notes / gap
The task actually benefits from AI rather than simple rules-based automation		
Expected AI output can be described clearly		
Examples of acceptable output are available		
Someone can review AI output where accuracy matters		
AI errors would be detectable before causing serious harm		
Sensitive data exposure has been considered		
AI output will not be treated as automatically correct in high-impact decisions		

7. Risk & Governance

Readiness statement	Score 0–4	Notes / gap
Customer impact from an error has been considered		
Financial impact from an error has been considered		
Privacy/security implications have been considered		
Actions requiring human approval have been identified		
Logs/history can be retained where accountability is important		
An owner is responsible for monitoring the automation or AI workflow		
A shutdown/rollback process exists for serious problems		

Readiness Score Summary

Add the scores for each section. Use the score as a discussion aid—not as an automatic approval to deploy AI or automation.

Area	Score	Maximum
Process Readiness		28
Automation Candidate Strength		28
Data Readiness		28
Team & Ownership Readiness		28
Technology & Integration Readiness		28
AI-Specific Readiness		28
Risk & Governance		28
TOTAL		**196**

Suggested interpretation: 0–49 = Early Stage · 50–98 = Developing · 99–147 = Ready · 148–196 = Strong Foundation.

A strong total score does not override serious privacy, security, financial, customer-impact or human-oversight concerns.

Automation Priority Matrix

List candidate processes and compare business value with implementation effort. Start with opportunities that are useful, repeatable and reasonably controlled.

Candidate process	Business value Low/Med/High	Effort Low/Med/High	Risk Low/Med/High	Priority

AI or Traditional Automation?

Use traditional rules-based automation when the trigger, conditions and actions are predictable. Consider AI when the task requires interpretation, classification, summarization, extraction, drafting or other work that cannot be handled reliably with simple rules alone.

Question	Yes / No
Can clear rules handle most of the task?	

Question	Yes / No
Does the task require interpreting unstructured text, images or language?	
Can AI output be reviewed or validated where accuracy matters?	
Would an AI mistake create significant customer, legal, financial or safety impact?	
Can a simpler automation solve the problem with less risk or cost?	

Implementation Readiness Checklist

■ Define the process and desired outcome.

■ Establish a baseline: time, cost, volume, errors or response time.

■ Choose one controlled pilot instead of automating everything at once.

■ Define triggers, rules, exceptions and human approvals.

■ Confirm data access, permissions and privacy requirements.

■ Test with realistic examples and edge cases.

■ Document who owns the workflow.

■ Define how failures will be detected.

■ Keep a rollback/manual fallback process.

■ Review results after launch and adjust before expanding.

30-Day Action Plan

Period	Action
Week 1	Document one high-priority process and establish the baseline.
Week 2	Confirm data, systems, integrations, risks and human approvals.
Week 3	Build/test a limited pilot using realistic scenarios.
Week 4	Measure results, document issues and decide whether to improve, expand or stop.

Related Business Tools Lab Resources

Use this checklist with the Automation Opportunity Finder to identify candidate workflows, the Software Finder to evaluate software needs, the Software Stack Builder to organize systems, and the Software Budget Calculator to estimate costs.

Important: This checklist is for general business planning and educational purposes only. It does not replace professional legal, privacy, cybersecurity, financial, employment or industry-specific advice. AI and automation systems can produce errors and require appropriate testing, monitoring and human oversight.