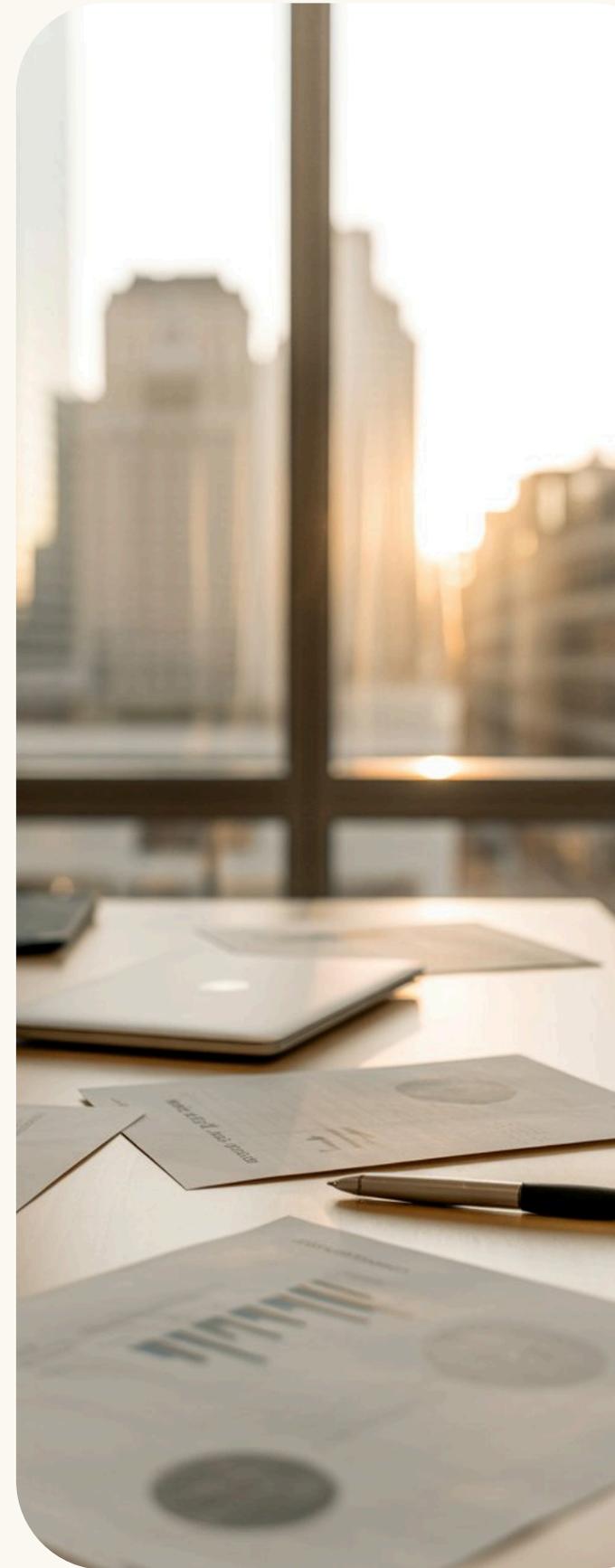# ARE YOU "AI-READY"?

A Simple 5-Point Checklist for SMBs

(Score yourself honestly—it reveals your starting point.)

WHY THIS MATTERS

Most businesses want AI.
But not all are ready for AI.

This simple checklist helps you understand:
 • where you stand today
 • what to fix first
 • where AI can make the biggest impact

Take 60 seconds and score each category.

01.

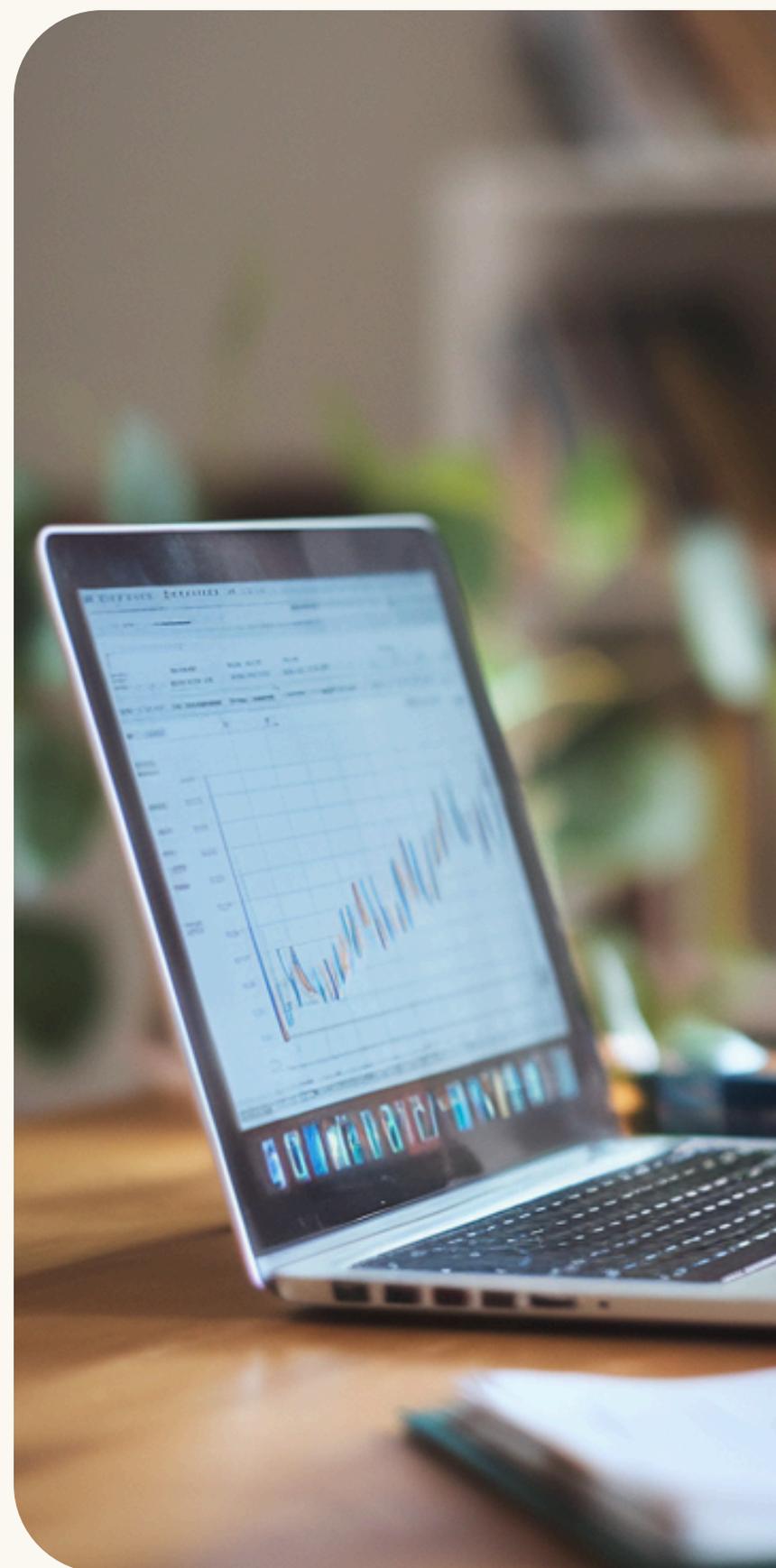# CLEAN, RELIABLE FINANCIAL DATA

What "Ready" Looks Like:

- Books are current
- Categories are consistent
- No duplicate or missing transactions
- Bank feeds are working properly
- Month-end close is predictable

Score Yourself (1–5):

1 = Books are behind/messy

3 = Up to date but inconsistent

5 = Clean, timely, and reliable every month.

02.

DOCUMENTED WORKFLOWS

What "Ready" Looks Like:

- Your AP, AR, payroll, and month-end processes are mapped
- Tasks aren't trapped in someone's head
- You know each step, owner, and dependency

Score Yourself (1–5):

1 = No documented processes

3 = Some steps written down, not consistent

5 = Clear, repeatable workflows for all core functions

03.

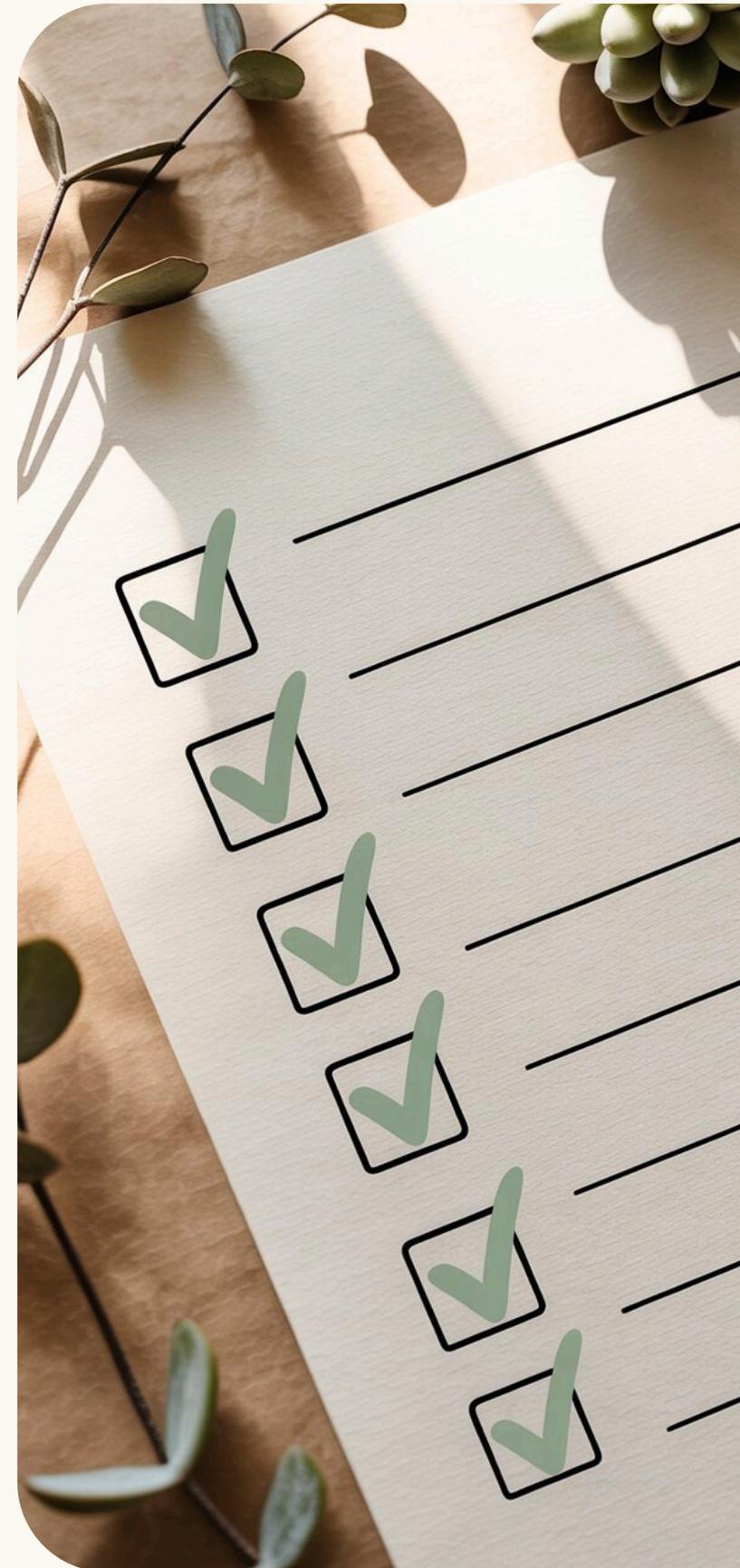# CLEAR GOALS FOR AUTOMATION

What "Ready" Looks Like:

- You know which tasks drain time
- You know your desired outcomes
- You've identified one or two small automation wins

Score Yourself (1–5):

1 = "We want AI but don't know why"

3 = Rough idea of areas to improve

5 = Specific use cases defined (e.g., faster close, fewer errors)

07.

SECURE SYSTEMS & PERMISSIONS

What "Ready" Looks Like:

- Secure login + MFA
- Controlled access by role
- Clear rules for sharing financial data
- Cloud tools managed properly
- You understand which tools are safe for sensitive information

Score Yourself (1–5):

1 = Shared passwords/unclear controls

3 = Basic protections but inconsistent

5 = Strong systems, controls, and policies consistently followed

05.

A TEAM READY FOR CHANGE

What "Ready" Looks Like:

- Your team understands the why behind AI
- Workloads are documented, not siloed
- People see AI as support—not a threat
- Leadership communicates clearly

Score Yourself (1–5):

1 = Team overwhelmed or resistant

3 = Mixed: some open, some unsure

5 = Open mindset, good communication, clear expectations

YOUR SCORE →

YOUR SCORE & WHAT'S NEXT

Add your numbers:

20–25 — Strong foundation.
You're ready for targeted AI wins.

14–19 — Ready to start small.
Focus on 1–2 high-impact areas.

10–13 — Build the basics first.
Clean data + workflows = top priority.

<10 — Start with clarity.
Fix the foundation before adding tools.

Your score is a starting point. Build your foundation one process, one improvement, one win at a time.

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