



BECKLEY & ASSOCIATES

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# ARE YOU “AI-READY”?

A Simple 5-Point  
Checklist for SMBs

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



SWIPE →



# 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:

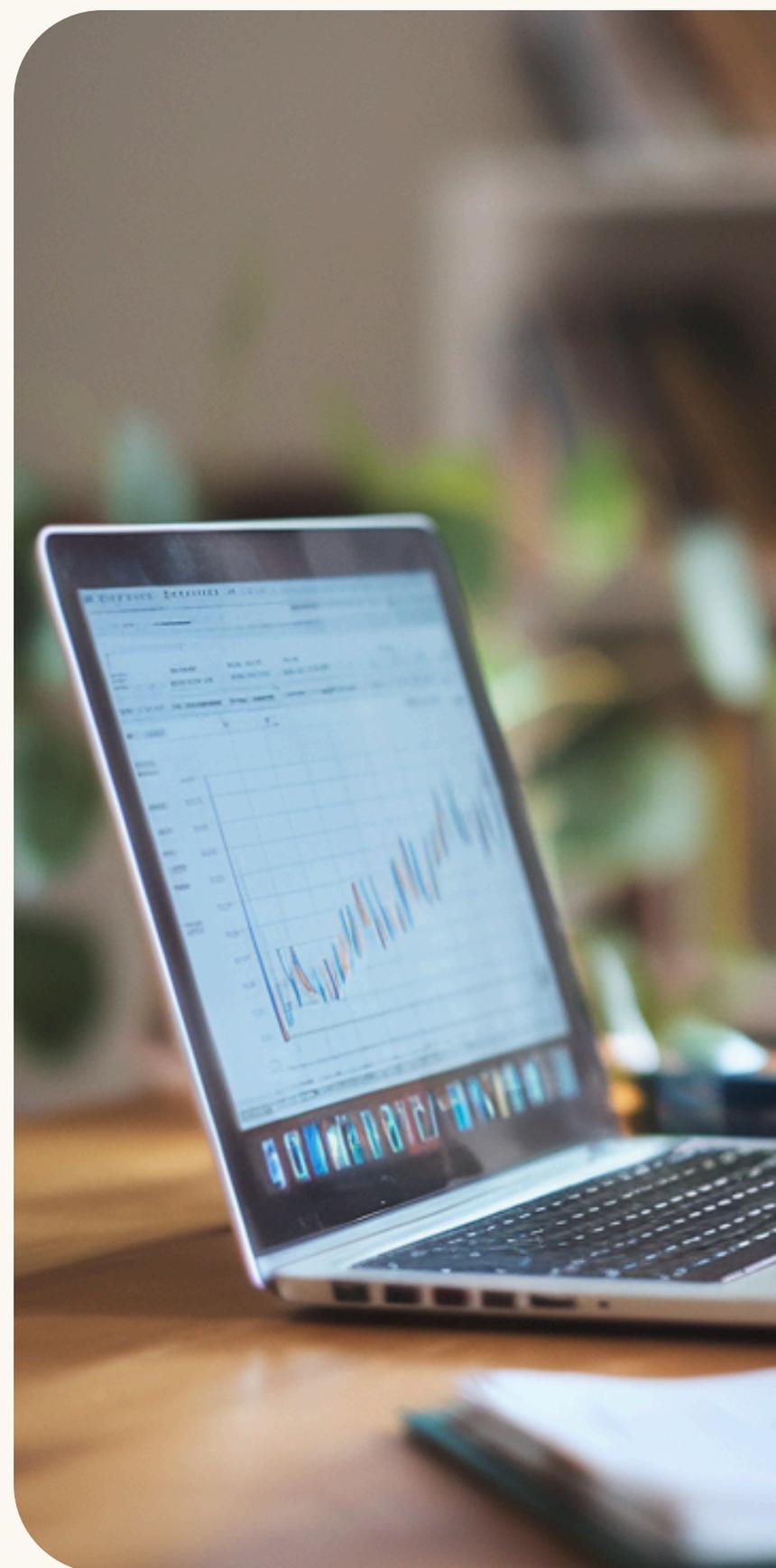
- Books are current
- Categories are consistent
- No duplicate or missing transactions
- Bank feeds are working properly
- Month-end close is predictable

## 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:

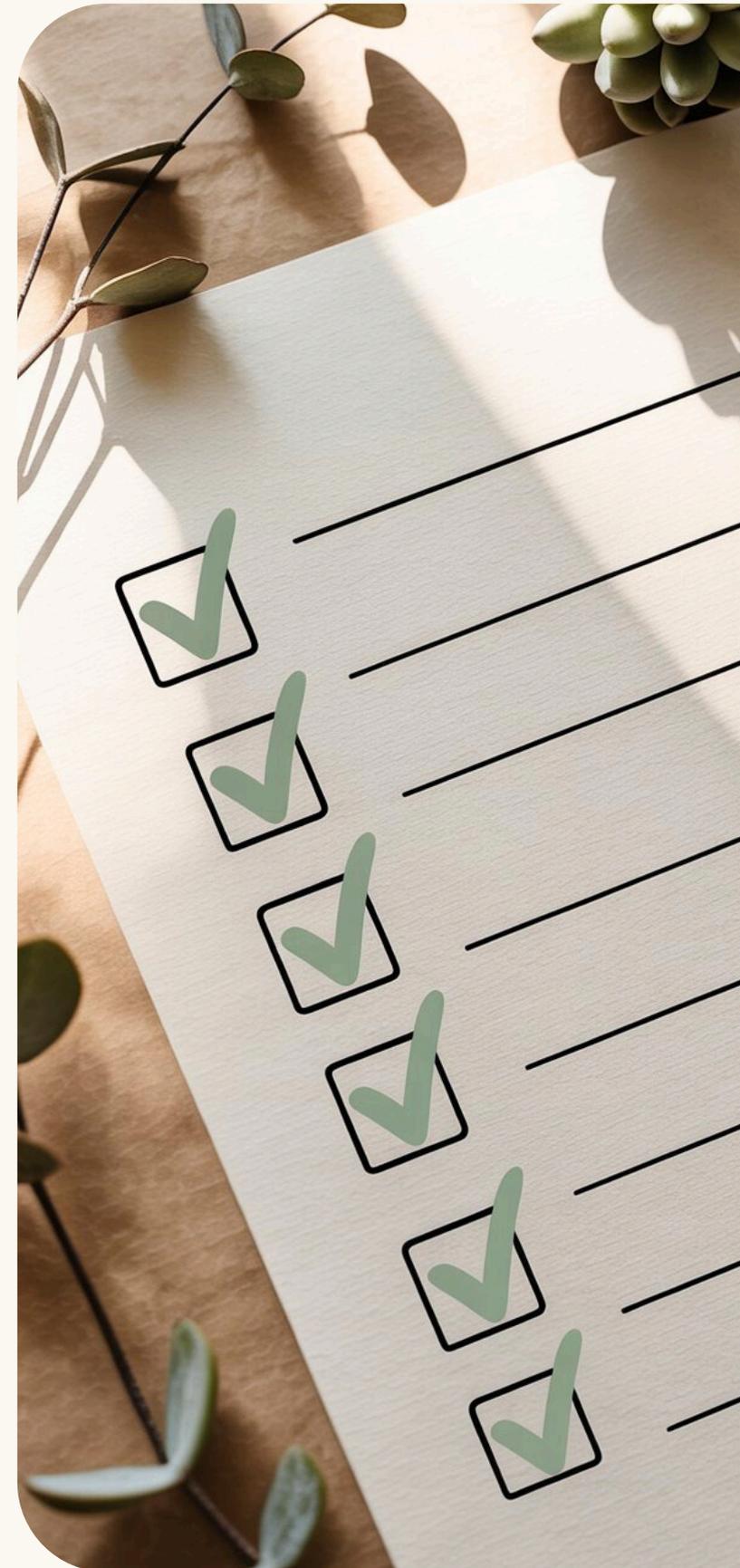
- You know which tasks drain time
- You know your desired outcomes
- You’ve identified one or two small automation wins

### 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)





04.

# 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.

