



AI Readiness Checklist for Small Business

Intelligence designed for Human Kind.

Introduction

AI is a powerful multiplier, but it requires a solid operational foundation. This checklist is designed to help you identify if your business is ready to transition from manual workflows to **“Human Kind Intelligence”**

1. The Digital Foundation

- Digitized Records:** Are your core business records (invoices, client files, schedules) primarily digital rather than on paper?
- Cloud Infrastructure:** Do you use centralized cloud-based tools like Microsoft 365, Google Workspace, or a dedicated CRM?
- Data Accessibility:** Can you easily export your customer list or sales data into a spreadsheet format (CSV/Excel)?

2. Process & Pain Points

- Task Identification:** Have you identified repetitive tasks (like data entry or email sorting) that take more than 2 hours a week?
- Bottleneck Awareness:** Can you point to a specific step in your service delivery where things usually “get stuck”?
- Standard Procedures:** Do you have written instructions (SOPs) for how your business handles its most common daily operations?

3. Culture & Safety

- Team Openness:** Is your staff generally tech-literate and open to trying new tools that reduce their manual workload?
- Security Consciousness:** Does your team understand the basics of not sharing sensitive passwords or private client data in public chats?
- Training Readiness:** Are you prepared to spend a few hours learning a new system if it saves you 20+ hours every month?

4. Growth & Scale

- Lead Management:** Is there a consistent process for tracking new inquiries from the first touchpoint to the final sale?
- Communication Volume:** Do you find yourself answering the same 5–10 questions from customers on a daily basis?



How many boxes did you check?

- 8-11 Checkmarks: AI Ready.** Your business has the foundation needed to implement advanced automations and custom AI tools immediately.
- 5-7 Checkmarks: Emerging.** You have a great start. We recommend focusing on standardizing your data and SOPs before scaling with AI.
- Below 5: Foundation Phase.** Focus on digitizing your records first. AI works best when the data it reads is clean and accessible.

Want a professional breakdown of your results?

Scan this document and send it to
info@humankindintelligence.ai for a free 15-minute
consultation.

