

AI READINESS ASSESSMENT

The Small Business AI Readiness Scorecard

Find your safest, fastest AI win in 15 minutes.

A practical assessment for small business owners who want to use AI without wasting money, exposing private data, or overwhelming their team.

Identify which parts of your business are ready for AI	Spot process, privacy, and tool gaps before they cause problems
Choose your best first AI pilot project	Plan a simple 30-day test your team can actually use

Plain-English AI consulting for small businesses

Welcome: Find the Right First AI Project

AI can help a small business save time, improve consistency, and get more work done. But it can also create problems when it is used before the business has clear processes, clean information, and basic privacy rules.

This scorecard helps you slow down and choose a practical first AI project. You do not need a perfect score. Most small businesses will have a mix of Ready, Partly, and Gap answers. The goal is to find a useful starting point without handing AI work it is not ready to handle.

By the end, you will know:

- Whether your business is ready for an AI pilot.
- Which areas need cleanup before AI can reliably help.
- Which tasks are safest to test first.
- What your first 30-day AI experiment should be.

How to score each item

Ready = 2 points. Partly = 1 point. Gap = 0 points. Add the score for all 40 items to get your total out of 80.

Before You Start

- Use honest answers, not aspirational ones.
- Think about your business as it operates today.
- Pick one person to own follow-up, even if you have a small team.
- Never paste private customer data, passwords, payment information, or confidential client details into public AI tools.

Consultant Tip

If a question feels unclear, mark it as Partly or Gap. Unclear ownership, unclear process, and unclear data rules are exactly the kinds of issues AI tends to expose.

Your Working Notes

Business name: _____

Person completing this scorecard: _____

Date: _____

One process I most want AI to improve: _____

Section 1: Business Foundations

What this section checks

AI performs best when your business basics are clear, documented, and repeatable. Start here before choosing a tool.

Readiness question	Ready 2 pts	Partly 1 pt	Gap 0 pts
1. We have written steps for at least three recurring business processes, such as intake, follow-up, quoting, onboarding, support, or reporting.	☐	☐	☐
2. Our most common customer questions are written down in one reliable place.	☐	☐	☐
3. Our pricing, packages, services, or product details are stored in one reliable place that the team knows to use.	☐	☐	☐
4. Our brand voice is documented with examples of what sounds like us and what does not.	☐	☐	☐
5. We have a clear offer, audience, and primary call to action on our website.	☐	☐	☐
6. We know which tasks are repetitive enough to be worth improving with AI.	☐	☐	☐
7. We can explain what a successful AI pilot would accomplish in one sentence.	☐	☐	☐
8. We have someone who can review AI output before it reaches customers.	☐	☐	☐

Business Foundations

score: _____ / 16 Add 2 for Ready, 1 for Partly, and 0 for Gap.

Section 2: Data & Tools Audit

What this section checks

AI is only as useful as the information and systems behind it. This section checks whether your tools and data are ready.

Readiness question	Ready 2 pts	Partly 1 pt	Gap 0 pts
1. We know where customer information lives, such as CRM, email platform, forms, spreadsheets, documents, or website systems.	☐	☐	☐
2. We know which website platform we use and who has admin access.	☐	☐	☐
3. Important logins are stored securely and are not shared through email, chat, or spreadsheets.	☐	☐	☐
4. Our website, files, and key systems are backed up regularly.	☐	☐	☐
5. We have safe, non-sensitive examples AI can use for testing, such as sample emails, FAQs, outlines, proposals, or internal notes.	☐	☐	☐
6. Our files and folders are organized well enough that a team member can find what they need.	☐	☐	☐
7. We know which software tools overlap or duplicate one another.	☐	☐	☐
8. We know which tools renew monthly or annually and who owns those accounts.	☐	☐	☐

Data & Tools Audit score: _____ / 16 Add 2 for Ready, 1 for Partly, and 0 for Gap.

Section 3: Team & Skills

What this section checks

AI adoption is not just a technology decision. It needs a clear owner, a little practice, and realistic expectations.

Readiness question	Ready 2 pts	Partly 1 pt	Gap 0 pts
1. One person is responsible for leading AI experiments and keeping notes.	☐	☐	☐
2. At least one team member has used ChatGPT, Claude, Gemini, or another AI assistant.	☐	☐	☐
3. Team members are comfortable copy-pasting prompts and revising instructions.	☐	☐	☐
4. We can set aside at least 30 minutes per week for testing and improvement.	☐	☐	☐
5. We have a simple place to collect prompts, examples, and results that worked well.	☐	☐	☐
6. We know who approves customer-facing AI-assisted content before it is published or sent.	☐	☐	☐
7. We have discussed where AI should help and where human judgment still matters.	☐	☐	☐
8. We are willing to start with a small pilot instead of trying to automate everything at once.	☐	☐	☐

Team & Skills score: _____ / 16 Add 2 for Ready, 1 for Partly, and 0 for Gap.

Section 4: Risk & Privacy

What this section checks

Good AI use starts with boundaries. This section helps you prevent avoidable mistakes before they happen.

Readiness question	Ready 2 pts	Partly 1 pt	Gap 0 pts
1. We know whether we handle personally identifiable information, health details, payment data, or confidential client data.	☐	☐	☐
2. We have a written or informal rule for what information must not be pasted into AI tools.	☐	☐	☐
3. We remove names, emails, account numbers, and other sensitive details from examples before testing prompts.	☐	☐	☐
4. We understand that AI output can be wrong and must be reviewed before use.	☐	☐	☐
5. We know whether contracts, NDAs, client requirements, or industry rules limit how we can use AI.	☐	☐	☐
6. We have decided which AI tools are approved for business use.	☐	☐	☐
7. We know who reviews, approves, and takes responsibility for AI-assisted work before it reaches customers.	☐	☐	☐
8. We have a process to check factual claims, legal language, medical language, or financial claims before publishing.	☐	☐	☐

Risk & Privacy score: _____ / 16 Add 2 for Ready, 1 for Partly, and 0 for Gap.

Watch Out

If you are unsure whether information is private, confidential, regulated, or contract-limited, treat it as sensitive until you confirm otherwise.

Section 5: Goals & Quick Wins

What this section checks

The best first AI project is usually small, repetitive, easy to review, and safe to test.

Readiness question	Ready 2 pts	Partly 1 pt	Gap 0 pts
1. We can name our top three repetitive tasks that drain time every week.	☐	☐	☐
2. We know how many hours per week we spend on email, content, support, admin, or reporting tasks.	☐	☐	☐
3. We can identify one customer-facing bottleneck that slows down sales or service.	☐	☐	☐
4. We have existing examples AI can learn from, such as emails, FAQs, blog posts, proposals, SOPs, or support notes.	☐	☐	☐
5. We can test an AI workflow without disrupting customers or core operations.	☐	☐	☐
6. We can measure success with one simple metric, such as time saved, fewer revisions, faster replies, or more consistent output.	☐	☐	☐
7. We have a budget comfort level for AI tools: \$0, under \$50/month, under \$200/month, or custom.	☐	☐	☐
8. We know what we will stop doing if the AI pilot does not save time or improve quality.	☐	☐	☐

Goals & Quick Wins score: _____ / 16 Add 2 for Ready, 1 for Partly, and 0 for Gap.

Your AI Readiness Result

Add your five section scores below. Each section is worth 16 points. Your total score is out of 80.

Category	Score	What to notice
Business Foundations	___ / 16	Are your offers, processes, and review steps clear enough for AI to follow?
Data & Tools Audit	___ / 16	Can you find, protect, and safely use examples from your business systems?
Team & Skills	___ / 16	Does someone own the test and know how to improve prompts?
Risk & Privacy	___ / 16	Are there clear boundaries for sensitive data and customer-facing output?
Goals & Quick Wins	___ / 16	Can you choose a small project and measure whether it worked?
Total AI readiness score	___ / 80	Use the table below to choose your next step.

Readiness Levels

Score	Readiness level	Recommended path
65-80	Pilot Ready	Launch one focused AI workflow for 30 days.
45-64	Quick-Win Ready	Choose a low-risk internal task and keep the scope tight.
25-44	Foundation First	Clean up processes, files, access, and review rules before automating.
0-24	High Risk	Do not automate customer-facing work yet. Start with documentation and privacy basics.

Best rule of thumb

Start with a task that is repetitive, low-risk, easy to review, supported by existing examples, and measurable within 30 days.

Red Flags: Stop Before Using AI With Real Customer Work

- You are unsure what customer data your business collects or stores.
- Passwords or logins are shared through email, chat, or spreadsheets.
- No one reviews AI output before customers see it.
- Your team does not know what information must never be pasted into AI tools.
- The task involves legal, medical, financial, or confidential client details without expert review.

Choose Your Best First AI Pilot

Use this page to avoid the most common mistake: picking a project that is too risky, too broad, or too hard to review.

Good First Pilot Project Picker

Possible AI project	Time saved	Risk	Easy to review?	Good first pilot?
Drafting internal emails	High	Low	Yes	Yes
Summarizing meeting notes	Medium	Low	Yes	Yes
Turning bullet points into first drafts	Medium	Low	Yes	Yes
Creating blog or website outlines	Medium	Low	Yes	Yes
Organizing repeated support questions	High	Medium	Yes	Maybe
Answering customers automatically	High	Medium/High	Sometimes	Not first
Writing legal, medical, or financial advice	High	High	No	No
Handling private customer data	High	High	No	No

Your First AI Pilot

Task I want to improve:

Who owns the test:

What success looks like:

Safe examples we can use:

Information AI must never receive:

Review date:

Action Step

Write one simple success metric before you begin, such as time saved, fewer revisions, faster replies, or more consistent output.

30-Day AI Pilot Action Plan

Keep the first test small. The goal is not to automate everything. The goal is to prove that one AI-assisted workflow can save time or improve quality without creating new problems.

Week	Focus	What to do	Done
Week 1	Choose	Pick one pilot. Collect 3-5 safe examples. Write what AI must not receive.	☐
Week 2	Build	Write and test prompts. Save the best version with clear instructions and examples.	☐
Week 3	Use	Apply the prompt to real internal work. Track time saved and review quality.	☐
Week 4	Decide	Review results. Keep, improve, expand, or stop the workflow.	☐

Recommended Starter Projects

- Rewriting internal emails so they are clearer and faster to send.
- Drafting FAQ answers for team review.
- Summarizing meeting notes and turning them into action items.
- Turning bullet points into first drafts for blog posts, pages, or proposals.
- Organizing repeated support questions into themes.
- Creating website or blog outlines from your own examples.

What to Track

- How many minutes the task took before and after the pilot.
- How many revisions were needed before the work was usable.
- Whether the output sounded like your business.
- Whether the workflow reduced stress or created extra cleanup.

Want help interpreting your score?

Book a free 20-minute AI Readiness Call. I will help you identify your best first AI project, avoid risky use cases, and choose a workflow your team can actually use.

marclaclear.com