Small Business AI Readiness Checklist

September 26, 2026 | Start with one workflow, not your whole business.

Choose a recurring task. Score each check: **0 = not in place, 1 = partly in place, 2 = in place with a concrete example.** Note the evidence and your next action.

Workflow: _____ Owner: _____

01 / A clear outcome

0 / 1 / 2

Can you name the task and the result you want to improve?

Write one outcome, such as reducing the time spent drafting weekly client updates. Avoid a broad goal like "use more AI."

02 / A repeatable workflow

0 / 1 / 2

Can you show how the task works today?

Document the trigger, inputs, steps, output, and common exceptions. If the process changes every time, narrow the task first.

03 / A named owner

0 / 1 / 2

Does one person own the pilot and have time to review it?

Name the person who can approve changes, answer questions, and stop the pilot. Confirm the time they can commit.

04 / Usable examples

0 / 1 / 2

Do you have representative inputs and examples of good outputs?

Gather a small set that includes ordinary work and difficult cases. Use synthetic or approved, de-identified material for early tests.

05 / Permission to use the data

0 / 1 / 2

Have you confirmed what information the chosen tool may receive?

Identify sensitive fields, who may access them, and the approved tool settings for storage and retention. If permission is unclear, keep real data out.

06 / A human quality check

0 / 1 / 2

Can someone judge whether each output is acceptable?

Define checks for accuracy, completeness, and tone. Keep a person responsible for approval before outputs reach customers or change records.

07 / A baseline and success measure

0 / 1 / 2

Can you compare the pilot with the current way of working?

Record current time, volume, and common errors. Measure review and correction time as well as drafting time; faster drafts alone are not a win.

08 / A fallback and stop rule

0 / 1 / 2

Can you return to the existing process if the pilot fails?

Keep the manual workflow available. Decide what errors, extra work, or unexpected data exposure will stop the pilot, and who handles them.

Total: ____ / 16 Required controls: 3 ____ 5 ____ 6 ____ 8 ____

Turn your answers into a small pilot

Use the score to choose the next step

0-7: Build the foundations

Narrow the workflow, document the steps, and gather usable examples before choosing a tool.

8-12: Close the gaps

Choose the two weakest checks. Assign an owner and a next action to each, then re-score when you have evidence.

13-16: Consider a bounded pilot

Start a small, reversible test only after the four required controls are fully in place.

Four controls override the total

Checks 3, 5, 6 and 8 must each score 2 before using real business data or outputs. A high total does not replace a named owner, data permission, human review, or a fallback. If any is missing, use synthetic examples to learn while you close the gap.

Choose the right role for AI

AI takes on: a bounded, repeatable step with agreed checks.
AI supports: a draft or suggestion that a person reviews.
Humans lead: decisions, relationships, exceptions, and accountability.

Plan one week of learning

Workflow and output to test: _____

Owner and reviewer: _____

Approved inputs and tool: _____

Baseline: time, volume, and errors: _____

Success measure including review time: _____

Stop condition and manual fallback: _____

Example: draft a weekly client update

Use an approved template and synthetic notes first. Compare drafting plus review time with the manual baseline. A person checks every fact and sends the final update. Stop if the draft invents facts or correction takes more work than the manual approach. This is an illustrative pilot, not a client result.

This is an original FreeCapacity planning aid, not a validated assessment or a guarantee of savings.

Need help choosing the first workflow? Request a free AI Opportunity Call.