



AIThrive

FREE RESOURCE · 2026 EDITION

The SMB AI Readiness Checklist

25 questions to find out exactly where AI will save your business time, money, and headcount — before you spend a dollar on implementation.

25

Diagnostic Questions

5

Business Areas Covered

10 min

To Complete

\$0

Cost to You

How to Use This Checklist

This checklist works best when you're honest. There are no right or wrong answers — the goal is to surface where your business is doing repetitive, rule-based work that a well-configured AI system could handle better, faster, and for less.



Check the box if YES

Tick each item your business currently does manually, inconsistently, or "by memory" today.



Count your score

At the end of each section, tally your checked items. Higher scores = higher AI opportunity.



Focus on your top section

Your highest-scoring section is where an AI implementation would pay back fastest.



Book a free call

Bring your results to a free 30-min discovery call and we'll tell you what's buildable in your budget.



Average SMB result: businesses that complete this checklist identify 3–6 automatable workflows. Even a single workflow, once automated, typically saves 5–15 hours per week and pays for implementation within 3 months.



Check each item your business currently handles manually or inconsistently.

- ☐ **Your team manually replies to the same customer questions every week**
Pricing, hours, availability, how to book, where to find you — answered 10+ times a week via WhatsApp, email, or phone.
- ☐ **Inquiry response time is measured in hours, not minutes**
You know leads go cold, but you can't afford to have someone watching messages all day.
- ☐ **No formal follow-up sequence exists for leads who don't convert immediately**
If a customer doesn't book or buy in the first interaction, there's no automated system to bring them back.
- ☐ **Appointment reminders are sent manually (or not at all)**
No-shows cost you money and manual reminder calls or messages cost you time.
- ☐ **Post-sale follow-up (review requests, feedback, upsells) doesn't happen consistently**
You know you should ask for reviews and check in after delivery — but it depends on who remembers.

**What AI does here:**

A WhatsApp or website AI agent handles FAQs 24/7, qualifies leads, sends reminders automatically, and triggers follow-ups without any manual action. Typical result: 60–80% fewer interruptions for staff, 2–3x faster response to new leads.



SECTION 2 OF 5

Operations & Admin

SCORE

___/5

- ☐ **Data gets entered into multiple systems by hand**
Orders in one system, invoices in another, CRM in a third — and someone moves numbers between them daily.
- ☐ **Reports or summaries are compiled manually every week/month**
Sales summaries, stock counts, attendance — pulled together from spreadsheets or memory by a person.
- ☐ **New client/customer onboarding takes more than 2 days of back-and-forth**
Collecting information, sending contracts, gathering signatures — each step waits on a human.
- ☐ **Scheduling or dispatching requires someone to manage it in real time**
Routes, shifts, job assignments — someone spends hours each week organizing this.
- ☐ **Documents (contracts, forms, proposals) are created from scratch each time**
No template that auto-fills with client details — someone formats every single one.



SECTION 3 OF 5

Inventory & Supply Chain

SCORE

___/5

- ☐ **Stock levels are checked manually rather than tracked automatically**
- ☐ **You've had a stockout or overorder in the last 6 months due to forecasting gaps**
- ☐ **Purchase orders are created and sent manually to suppliers**
- ☐ **You have no automated alert when a product drops below a reorder threshold**
- ☐ **Receiving deliveries and updating stock records is a manual process**



SECTION 4 OF 5

Finance & Billing

SCORE
___/5

- ☐ **Invoices are created, sent, and chased manually**
You or your team track who's paid, who's overdue, and chase late payments by hand.
- ☐ **Expense categorization is done manually at end of month**
Receipts pile up. Someone sorts them, categorizes them, and enters them before the accountant visit.
- ☐ **You don't have a real-time view of cash flow without pulling reports manually**
- ☐ **Payment reconciliation takes more than 2 hours per week**
- ☐ **Payroll requires manual timesheet review or calculation**



SECTION 5 OF 5

Marketing & Sales

SCORE
___/5

- ☐ **Social media is posted manually with no content calendar or system**
Posts happen when someone remembers, not on a consistent schedule that builds an audience.
- ☐ **You have no automated email sequence that nurtures leads over time**
- ☐ **Sales proposals or quotes take more than 1 day to produce**
- ☐ **Customer segmentation (who's bought what, who's about to churn) isn't tracked**
- ☐ **You spend more than 3 hours/week on marketing tasks that feel repetitive**

YOUR RESULTS

What Does Your Score Mean?

Add up your totals from all 5 sections. Maximum score: 25.

0-8

Early Stage — Foundation First

Your operations are lean. A single focused automation (like a customer FAQ agent) will have an outsized impact. Start with one workflow and build from there.

9-16

Growth Stage — Strong AI Opportunity

You have multiple interconnected workflows that are eating time and creating errors. An AI Builder implementation (2-3 connected systems) will give you significant capacity gains within weeks.

17-25

Scale Stage — You're Ready for AI Transform

Manual processes are a significant drag on your growth. You need an AI operations layer across your business — not one tool, but a connected system. This is exactly what AI Transform is designed for.

MY TOTAL SCORE

Add up all 5 sections above

/ 25

5 Workflows Any SMB Can Automate

These are the highest-ROI starting points we see across every industry. Each one typically pays for itself within 60–90 days.



1. Customer FAQ Agent (WhatsApp / Website)

Responds to 80% of inbound customer questions 24/7. Escalates to human only when needed. Average time saved: 2–4 hours/day per staff member.



2. Appointment Booking & Reminder System

Customers self-book 24/7. Automated reminders reduce no-shows by 40–60%. Confirmation and reschedule flows handled without staff.



3. Invoice & Payment Follow-Up Automation

Invoices generated and sent automatically on job completion. Payment reminders sent at 7, 14, and 30 days. Average: 40% reduction in late payments.



4. New Client Onboarding Workflow

Automatically sends welcome sequence, collects intake information, generates and sends contracts, schedules kickoff call. Typical time savings: 3–5 hours per client.



5. Weekly Operations Digest

Automated report delivered every Monday morning: revenue vs target, top leads in pipeline, team capacity, outstanding invoices, and inventory alerts. Zero manual data-pulling.



Know where AI fits. Now find out what it **would actually cost to build it.**

Book a \$500 AI Audit. We'll map your processes, rank your automation opportunities by ROI, and give you a written report — no commitment to proceed required. Most clients recoup the cost within the first week of implementation.

WHAT'S INCLUDED IN THE AI AUDIT

- ✓ Full process map
- ✓ ROI estimates per workflow
- ✓ Written report (PDF)
- ✓ Ranked automation list
- ✓ 30-min debrief call
- ✓ Credit toward any project

Book Your AI Audit — \$500 · aithrive.bywillo.ai/audit

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