



Is your business ready for AI?

A practical self-audit for business owners and leaders.

Find where AI could help, what your business needs first, and how to take the next step.

Inside

Six readiness checks · questions to ask your team · practical fixes for common gaps · your first 30-day action plan

You don't need a technical background.

You need to know your business, and be willing to ask a few questions about how it works.

Start with work you want to improve.

Think about one part of your business where people spend too much time searching, copying, checking, writing, or following up. Use that work as your example throughout this audit. Your business may be ready for AI in one area and need preparation in another.



WHERE TO LOOK

IF YOUR TEAM REGULARLY...	YOU COULD EXPLORE...
Answers the same questions	Preparing answers from approved company information
Writes similar emails or documents	Creating first drafts for someone to review
Searches across files and systems	Bringing relevant information together
Checks records for missing details	Flagging incomplete items for follow-up
Turns conversations into next steps	Drafting task lists from meeting notes

WRITE DOWN YOUR STARTING POINT

The work we want to improve: _____

Who does it today: _____

What we want to improve:

☐ Time spent
 ☐ Speed
 ☐ Quality
 ☐ Customer experience
 ☐ Capacity

HOW TO COMPLETE THE AUDIT

For each statement on the next six pages, mark:

Yes: This is in place, and we can show an example.

Partly: Some of it exists, but there are gaps.

No: This is missing.

Unsure: Someone needs to verify it.

Answer for the work you selected above. Ask the people who do it to check your answers.

THE GOAL

Leave with one useful opportunity, a clear view of what it needs, and a short list of actions.

Could you explain the job to a new hire?

AI needs a clear assignment. Before introducing it, make sure your team agrees on how the work starts, what happens next, and what a good result looks like.



CHECK YOUR BUSINESS

01 · We can describe the work from start to finish.

We know what starts it, the main steps, and when it is complete.

☐ Yes ☐ Partly ☐ No ☐ Unsure

02 · We can show examples of good work.

We have completed examples someone could use to learn the job and check the result.

☐ Yes ☐ Partly ☐ No ☐ Unsure

03 · We know when the usual process does not apply.

We can identify unusual cases and name the person who handles them.

☐ Yes ☐ Partly ☐ No ☐ Unsure

WHAT THIS LOOKS LIKE

For customer inquiries: read the message, check the customer's record, prepare a reply, and send it for approval. Complaints and unusual pricing requests go to the manager.

IF YOU HAVE GAPS

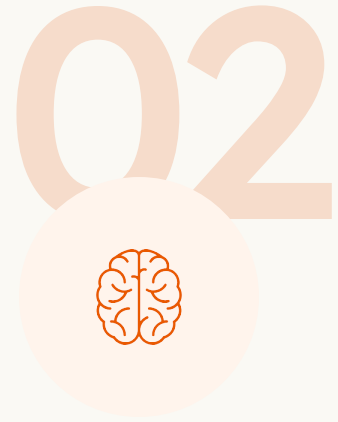
Walk through three recent examples with the person doing the work. Write down the steps, decisions, and exceptions on one page.

TAKEAWAY

You don't need to document your entire company. Start with the one job you want to improve.

Can people find the right answer?

Your policies, customer records, product details, and past decisions help people do good work. AI will need the relevant information too. The first question is whether that information is available and trustworthy.



CHECK YOUR BUSINESS

01 · The information this job needs is written down.

It is available in documents or business systems, rather than depending entirely on someone's memory.

☐ Yes ☐ Partly ☐ No ☐ Unsure

02 · We know which version to trust.

People can distinguish current information from old drafts and outdated records.

☐ Yes ☐ Partly ☐ No ☐ Unsure

03 · Someone is responsible for keeping it current.

There is a named person who corrects errors and updates the information when things change.

☐ Yes ☐ Partly ☐ No ☐ Unsure

WHAT THIS LOOKS LIKE

A person preparing a customer quote can find the current price list, approved discount rules, and relevant customer details without asking the owner.

IF YOU HAVE GAPS

Gather the information needed for your first job. Identify the approved versions, mark outdated material, and assign someone to maintain it.

TAKEAWAY

Start with a small set of reliable information. Expand it as the work requires.

Can AI reach where the work happens?



A useful trial needs a practical way to receive information and return its work. That might begin with an approved folder and reviewed drafts. More connected work may require access to your business systems.

CHECK YOUR BUSINESS

01 · We know which systems the job uses.

We can list where the information comes from and where the finished work belongs.

☐ Yes ☐ Partly ☐ No ☐ Unsure

02 · The person managing those systems can confirm the access options.

We know who can check whether an approved AI tool can use the information it needs.

☐ Yes ☐ Partly ☐ No ☐ Unsure

03 · We have decided where people will review the output.

The result will arrive somewhere the responsible person already checks.

☐ Yes ☐ Partly ☐ No ☐ Unsure

WHAT THIS LOOKS LIKE

Draft replies appear in a shared review queue. The sales manager can check them without searching through a separate application.

IF YOU HAVE GAPS

List each system, its owner, and the access needed: reading information, creating drafts, or changing records. Have your administrator or provider confirm what is possible.

TAKEAWAY

Before paying for a build, verify access to the systems the job depends on.

Who will make this work?



Introducing AI changes someone's daily routine. A successful trial needs an owner, a reviewer, and people who understand how their work will change.

CHECK YOUR BUSINESS

01 · One person owns the business result.

They can make decisions, resolve questions, and decide whether the trial should continue.

☐ Yes ☐ Partly ☐ No ☐ Unsure

02 · Someone has time to review the work.

Checking results, giving feedback, and correcting mistakes are included in their workload.

☐ Yes ☐ Partly ☐ No ☐ Unsure

03 · The people affected have helped plan the change.

They understand the purpose, their responsibilities, and where to get help.

☐ Yes ☐ Partly ☐ No ☐ Unsure

WHAT THIS LOOKS LIKE

The sales manager owns the trial. A coordinator checks drafts each morning. Both help decide what makes a reply useful and which cases need extra attention.

IF YOU HAVE GAPS

Name the owner and reviewer. Agree on review time. Ask the people doing the work what would make the change helpful, and what could make it harder.

TAKEAWAY

Treat review and training as scheduled work. Give someone the time and authority to do them.

What needs a person's approval?

Decide what AI may do before it starts. Make the boundaries clear enough that your team can explain them without technical language.



CHECK YOUR BUSINESS

01 · We know what information may be used.

Someone responsible has checked which business and customer information is appropriate for the selected tool and task.

☐ Yes ☐ Partly ☐ No ☐ Unsure

02 · We have defined what needs approval.

The team knows which outputs must be reviewed before they are sent or used to change something.

☐ Yes ☐ Partly ☐ No ☐ Unsure

03 · We know how to handle a mistake.

Someone can inspect what happened, pause the task, and arrange corrections.

☐ Yes ☐ Partly ☐ No ☐ Unsure

WHAT THIS LOOKS LIKE

MAY DO AUTOMATICALLY	NEEDS APPROVAL	MUST ASK FOR HELP
Prepare a draft reply	Send the reply	Missing customer information
Suggest a follow-up	Promise a discount	Conflicting instructions
Summarize activity	Change an important record	An unusual customer request

IF YOU HAVE GAPS

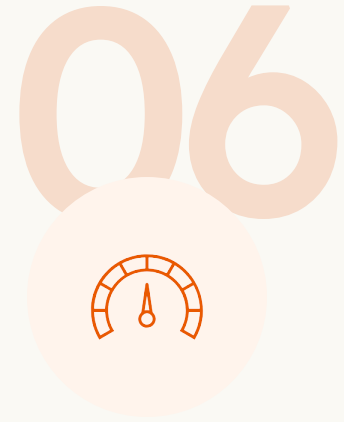
Write these three lists for your selected job. Confirm who approves the work and who can stop it.

TAKEAWAY

Start with actions you can inspect and correct. Expand permissions after reviewing the results.

How will you know it was worth it?

A convincing demonstration is a starting point. Your trial should show whether AI improves the work enough to justify its cost and the attention it requires.



CHECK YOUR BUSINESS

01 · We know what the work takes today.

We have a reasonable baseline for volume, time spent, and the quality or speed we want to improve.

☐ Yes ☐ Partly ☐ No ☐ Unsure

02 · We have defined a worthwhile result.

We have a specific target and know what level of quality must be maintained.

☐ Yes ☐ Partly ☐ No ☐ Unsure

03 · We have allowed for the full cost.

Our estimate includes setup, software, usage, training, review, and ongoing support.

☐ Yes ☐ Partly ☐ No ☐ Unsure

A SIMPLE EXAMPLE · ILLUSTRATIVE

Today: 200 inquiries at 10 minutes each	33 hours
With AI: reviewing 200 drafts at 3 minutes each	10 hours
Monitoring and corrections	3 hours
Estimated time made available	20 hours

Check these assumptions during the trial. Time made available becomes useful when you decide what the team will do with it.

IF YOU HAVE GAPS

Measure a representative sample of today's work. Set a target, a spending limit, and a date to review the results.

TAKEAWAY

Count the time spent checking and fixing AI's work when you calculate the benefit.

YOUR RESULTS

What is ready? What needs attention?

Review your answers for the job you selected. A strength in one area does not cancel a missing requirement in another.



COMPLETE YOUR READINESS PROFILE

AREA	READY FOR THIS TRIAL	NEEDS WORK	NEEDS CHECKING
The work is clearly defined	☐	☐	☐
Required information is reliable	☐	☐	☐
Systems and access are confirmed	☐	☐	☐
People and ownership are assigned	☐	☐	☐
Rules and approval are clear	☐	☐	☐
Value and costs can be assessed	☐	☐	☐

Mark an area “Ready” when its three statements are verified. For other areas, record the missing item and decide whether it must be resolved before the trial.

CHOOSE YOUR NEXT STEP

01

Prepare

A required piece is missing: information, access, an owner, review capacity, or clear boundaries.

Resolve it, or narrow the job so you can start with what is available.

02

Run a supervised trial

The job is clear, the necessary information and access are available, and someone can review the output.

Set a target and test it on a limited amount of work.

03

Consider expanding

An existing trial has demonstrated useful results, manageable review effort, and acceptable quality.

Choose the next task and repeat the readiness check.

TAKEAWAY

You can be ready for one AI task today while preparing for more ambitious changes.

Make the next 30 days count.

Use this page to turn your answers into an assignment your team can act on.



OUR FIRST OPPORTUNITY

The job we want to improve: _____

The result we want: _____

Today's baseline: _____

Our target: _____

Business owner: _____

Person reviewing the work: _____

OUR THREE NEXT ACTIONS

WHAT NEEDS TO HAPPEN?

WHO OWNS IT?

BY WHEN?

1. _____
2. _____
3. _____

OUR TRIAL BOUNDARIES

Information and systems it may use: _____

Actions that need approval: _____

Setup and monthly spending limits: _____

Review time available each week: _____

OUR DECISION DATE

On _____, we will review the results and decide:

☐ Continue ☐ Adjust the approach ☐ Stop

We will check quality, time saved after review, total cost, and whether the team is using it successfully.

START HERE

Share this audit with the person who does the work and the person who manages your systems. Verify the uncertain answers together.

ABOUT GROUNDWORK

Groundwork helps small and mid-sized businesses prepare their information, connect their systems, and put AI to work in everyday operations.

Need help turning your audit into a plan? Bring your completed audit to Groundwork.