Small Business AI Checklist

A Practical Starting Point for Busy Owners



AI SCHEMATA

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A Practical Starting Point for Busy Owners

Identify one useful goal, take stock of your current practices, and choose a manageable place to begin. Check statements that are true today; leave uncertain items unchecked.

01 Start Here

What would make a meaningful difference in your business?

Save time • Improve customer communication • Reduce repetitive work
Organize information • Improve internal efficiency • Support business growth

One goal I would like AI to help my business accomplish:

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02 Quick Readiness Check

- ☐ I know where our important business information and data are stored.
- ☐ I know who has access to our business information.
- ☐ I can identify repetitive tasks that consume staff time each week.
- ☐ I know which customer questions, emails, or requests occur repeatedly.
- ☐ I can identify at least one business process that AI could help improve.

03 AI Systems & Tools

Which AI tools or AI-enabled systems are currently used?

- ☐ ChatGPT
- ☐ Microsoft Copilot
- ☐ Google Gemini
- ☐ AI features in CRM / customer software
- ☐ AI features in accounting / financial software
- ☐ AI marketing or social-media tools
- ☐ AI automation tools
- ☐ Industry-specific AI software
- ☐ None yet
- ☐ Other: _____

Do you know which AI tools employees use for work?

☐ Yes ☐ Somewhat ☐ No

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Where Your Business Stands

04 Employee AI Readiness

Unchecked items show where a little guidance or structure may help.

- ☐ Employees have received basic guidance on appropriate AI use.
- ☐ Employees know what should never be entered into public AI tools.
- ☐ Employees know when AI-generated information must be verified.
- ☐ We have clear expectations or policies for workplace AI use.
- ☐ Employees understand which AI tools are approved for business use.
- ☐ Someone in the organization is responsible for overseeing AI use.

05 AI Readiness Snapshot

Quick self-assessment: count only the 10 statements below that are true today.

- ☐ Leadership understands where AI may help our business.
- ☐ Employees have basic AI training appropriate to their work.
- ☐ We know which AI tools are in use and which are approved.
- ☐ Our key business information is organized and accessible to authorized staff.
- ☐ We have written expectations and guardrails for AI use.
- ☐ We have identified a workflow where AI could save time or improve quality.
- ☐ We know where AI may improve routine customer communication.
- ☐ We have identified repetitive tasks that may suit automation.
- ☐ We have considered security and privacy before using AI tools.
- ☐ We have assigned responsibility for reviewing AI use and results.

Total checked: _____ / 10

0–3 checked — Early Stage
Identify the safest, highest-value places to begin.

4–6 checked — Building Readiness
Some foundations are in place; gaps may remain in tools, training, policies, or implementation.

7–10 checked — Advancing Readiness
Several foundations are in place; consider more intentional AI integration.

This is a quick reflection tool, not a certification, scientific score, or industry benchmark. A higher total does not replace a review of privacy, security, and oversight.

06 Competitive Readiness

- ☐ I understand how businesses in my industry are beginning to use AI.
- ☐ I know whether competitors use AI to improve efficiency or customer experience.
- ☐ I understand where AI could give our business a competitive advantage.
- ☐ We have discussed the impact of competitors adopting AI capabilities faster.

AI readiness is becoming a business capability—not simply a technology decision. You do not need every new tool. Understanding where AI can improve efficiency, customer experience, decisions, and productivity supports better strategic choices.

Do you know how your AI readiness compares with others in your industry?
☐ Yes ☐ Somewhat ☐ No

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Choose a Clear Next Step

07 Simple First Use Cases

Begin with public, nonsensitive, or made-up information.

- ☐ Draft a routine email and edit it in my own voice.
- ☐ Summarize meeting notes with sensitive information removed.
- ☐ Organize common customer questions into an FAQ.
- ☐ Brainstorm marketing or social-media ideas.
- ☐ Create a first draft of an internal procedure.
- ☐ Identify repetitive administrative tasks that may suit automation.

08 Guardrails to Keep It Safe

- ☐ Do not paste sensitive client, employee, financial, medical, proprietary, or confidential business information into unapproved AI systems.
- ☐ Verify important facts, names, dates, numbers, and claims.
- ☐ Review AI-generated content before it reaches a customer.
- ☐ Set clear boundaries for what AI may and may not be used for.
- ☐ Determine who reviews or approves important AI-assisted work.
- ☐ Use approved business tools whenever possible.

09 My Biggest AI Readiness Gap

Based on this checklist, the area my business most needs to address is:

10 My Next Two Steps

Step 1: _____

Step 2: _____

Want a Clearer Picture of Where Your Business Stands?

An AI Schemata Small Business AI Readiness Assessment can help you evaluate your current systems, employee preparedness, workflows, safeguards, opportunities, and overall AI readiness.

It can also help identify where your business is positioned well—and where competitor adoption or changes in your industry could create strategic gaps.

Request an AI Readiness Assessment | aischemata.com

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