

AI Readiness Checklist for Small Businesses

Is Your Firm Ready to Automate? Score Yourself in 5 Minutes.

By KernTech — Workflow Automation for Small Businesses

Instructions

Rate each item: **Yes (2) | Partially (1) | No (0)**. Tally your score at the end.

1. Data & Document Readiness

| # | Question | Score | |---|-----|-----| | 1 | Client/customer records are stored digitally (not in paper files or personal email) | ____ | | 2 | You have a consistent naming convention for files and folders | ____ | | 3 | Key business data lives in a central system (CRM, practice management, PSA) — not scattered across spreadsheets | ____ | | 4 | Documents are searchable (PDF text, not scanned images) | ____ |

Section Total: ____ / 8

2. Process Clarity

| # | Question | Score | |---|-----|-----| | 5 | You can list your top 5 most repetitive tasks (and who does them) | ____ | | 6 | Client onboarding follows a documented checklist — not tribal knowledge | ____ | | 7 | You know roughly how many hours/week your team spends on manual data entry | ____ | | 8 | Handoffs between team members have defined steps (not "just ask Sarah") | ____ |

Section Total: ____ / 8

3. Tech Stack Foundation

| # | Question | Score | |---|-----|-----| | 9 | Your core software (accounting, ticketing, AMS) is cloud-based | ____ | | 10 | You use email + calendar from Google Workspace or Microsoft 365 | ____ | | 11 | At least one tool you use daily offers an API or Zapier integration | ____ | | 12 | Your team is comfortable adopting new software (not actively resistant) | ____ |

Section Total: ____ / 8

4. Time & Money Awareness

| # | Question | Score | |---|-----|-----| | 13 | You can estimate what 10 hours/week of admin work costs you annually | ____ | | 14 | You've lost revenue or clients due to slow response times or dropped follow-ups | ____ | | 15 | You have at least one process that makes you think "there has to be a better way" | ____ |

Section Total: ____ / 6

Your Score

| Range | Rating | What It Means | |-----|-----|-----| | **24–30** |  **Ready to automate** | Your foundation is solid. You'll see ROI from automation quickly. Start with your highest-volume repetitive task. | | **16–23** |  **Almost there** | A few gaps to close first — but you're closer than you think. Focus on centralizing data and documenting your top 3 workflows. | | **0–15** |  **Foundation first** | Automate too early and you'll automate chaos. Start by digitizing records and picking one central system for client data. |

Top 5 Quick Wins by Vertical

| Vertical | #1 Automation Opportunity | Est. Hours Saved/Week | |-----|-----|-----|
-----| | **Accounting Firms** | Client document collection & follow-up | 6–10 hrs | | **MSPs** | Ticket triage & assignment routing | 5–8 hrs | | **Insurance Agencies** | Policy renewal reminders & outreach | 4–7 hrs | | **Law Firms** | Client intake forms → case management | 5–8 hrs | | **Construction** | Daily report collection & filing | 3–6 hrs |

Next Step

Want to see exactly which workflows to automate first — and the expected ROI?

Book a free 30-minute workflow audit: cal.com/alan-kerntech/30min

No pitch. We'll map your top 3 opportunities and you'll walk away with a plan — whether you work with us or not.

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