



# AI Readiness Checklist for SMBs

## Reality Check

- AI is already affecting how businesses operate; ignoring it is a risk to your growth
- AI adoption doesn't mean slashing headcount; it's about working smarter.
- Without structure, AI can cause rework, confusion, or client risk.

## Common AI Myths (That Hurt Business)

- AI will replace your whole team
- AI will solve your productivity problems overnight
- Only tech companies can afford to use it well
- AI is fully self-managing once implemented
- AI replaces judgment, creativity, or strategy
- AI is just hype; it'll fade away soon

## Operational Safeguards (Minimums You Need)

- A basic AI use policy for staff (even a 1-pager)
- Clear do's and don'ts on data, tasks, and client info
- Role clarity so people know what AI supports vs owns
- Periodic review of tools for compliance, IP, and bias
- Don't rely on "free" tools without checking terms

## Smart Use Filters

- Does this help you serve clients better or just save minutes?
- Could automation break trust or reduce service quality?
- Are managers and staff aligned on usage rules?
- Is the tool reputable and export-friendly if you want to switch?

## Get Started Tips

- Pilot one workflow where time is lost (e.g., meeting notes, intake forms)
- Train staff before rolling anything out, even free tools
- Assign an internal "AI lead" to monitor use and update processes
- Schedule monthly reviews to avoid AI chaos or blind spots