



Free Guide

The Small Business AI Readiness Checklist

10 questions to answer before you spend a dollar on AI — or automate anything.

How to use this checklist

Most AI projects don't fail because the technology didn't work. They fail because the business wasn't ready for it. This checklist is designed to surface that before it becomes an expensive lesson.

Work through each section honestly. A "no" isn't a failure — it's a signal. It tells you exactly where to focus before you invest in any tool or automation.

If you answer yes to 8 or more of these questions, you're ready to start. Fewer than 6, and the foundation needs work first.

01 Foundation

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|--------------------------|--|
| ☐ | <p>We have at least one clearly defined, repeatable process.</p> <p>Not everything needs to be documented — but you should be able to point to at least one workflow that runs the same way every time.</p> |
| ☐ | <p>Our team follows that process consistently.</p> <p>If different people handle the same task in different ways, that inconsistency will be automated along with everything else.</p> |
| ☐ | <p>We know where our biggest operational friction is.</p> <p>You should be able to name the top one or two things that slow your business down or cost the most manual effort each week.</p> |

02 Data & Systems

- ☐ **Our customer and operational data lives in a system — not just in email or someone's head.**
AI needs data to work with. If your records are scattered across inboxes, spreadsheets, and memory, you'll need to clean that up first.

- ☐ **We know which tools we use and why we use them.**
If you can't list your current tech stack and explain what each tool does, you don't have a clear enough picture to build on.

- ☐ **We're not mid-transition on a major system or process.**
Automating something you're in the middle of changing is a reliable way to create work rather than eliminate it. Stabilize first.

03 Decision-Making

- ☐ **There is one person who owns technology decisions in this business.**
AI projects stall when there's no clear decision maker. If every tool purchase needs committee approval, that's the first thing to sort out.

- ☐ **We're willing to change how we do things if a better way exists.**
AI often requires rethinking a process, not just automating the current one. Resistance to change is the most common reason implementations fail.

04 Readiness & Resources

- ☐ **We have time to implement something properly — not just buy it.**
Setup, testing, and team adoption take real time. If no one has bandwidth right now, even the right tool will sit unused.

- ☐ **We're prepared to maintain what we build.**
AI tools drift. Processes change. What works today needs attention over time. If there's no one to own ongoing maintenance, that's a risk worth naming before you start.

Score your results

Score	Status	What it means
8–10 ✓	Ready	You have a solid foundation. Pick one high-friction, consistent process and start there. Don't try to automate everything at once.
6–7	Almost	A few gaps to close first. Review your “no” answers — those are the areas to address before investing in any tools.
< 6	Foundation first	Not yet — and that's fine. Buying tools now will create more problems than it solves. Focus on the process gaps first.

Not sure what your gaps are?

The Rahn Technology Audit is a focused, one-time engagement that gives you a clear picture of where your business stands today — what's working, what needs attention, and a 90-day action plan you can act on immediately.

Delivered within 10 business days. Written for a business owner, not a technician.

Book a call at rahn.ai · hello@rahn.ai