

AI Ready Business Scorecard

Check your AI readiness and get a custom plan to grow.

EXECUTIVE SUMMARY

AI isn't "coming."

It's already reshaping how ambitious small businesses grow, deliver, and compete.

This scorecard helps founders self-assess across the five pillars required to adopt automation effectively, without chaos, tech overwhelm, or bad hires.

AI doesn't create great businesses.

It amplifies the systems already in place.

Your job is to build the foundation, this scorecard shows where to start.

1. WHY AI READINESS MATTERS

Businesses that win in the AI era will:

- ✓ Operate lean
- ✓ Move faster than competitors
- ✓ Deliver consistent customer experience
- ✓ Out-market and out-execute bigger brands
- ✓ Spend less to grow more

Businesses that resist will:

- ✗ Drown in admin
- ✗ Hire reactively & waste money
- ✗ Struggle with scale & client delivery
- ✗ Lose to faster, smarter operations

The advantage is shifting to **system-driven entrepreneurs**.

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2. AI READINESS SCORECARD

Rate 1-5 (1 = not true, 5 = fully true)

Pillar	1	2	3	4	5
1. Lead Capture & Follow-up Systems	☐	☐	☐	☐	☐
2. CRM Hygiene & Contact Tagging	☐	☐	☐	☐	☐
3. SOPs for client delivery	☐	☐	☐	☐	☐
4. Marketing & content process	☐	☐	☐	☐	☐
5. Data organization (Drive/CRM)	☐	☐	☐	☐	☐
6. Appointment & intake workflows	☐	☐	☐	☐	☐
7. Payment & billing automation	☐	☐	☐	☐	☐
8. Review & referral systems	☐	☐	☐	☐	☐
9. KPIs Tracked Monthly	☐	☐	☐	☐	☐
10. Openness to tech adoption	☐	☐	☐	☐	☐

Total Score Guide

36-50 = AI-Ready, Scale with AI + systems edge

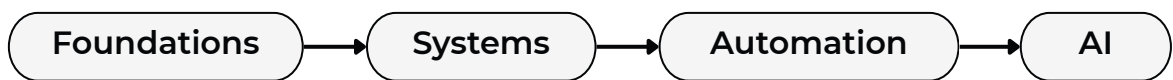
21-35 = Emerging, structure in place, needs automation

0-20 = Not ready, build foundations

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4. CORE COMPLIANCE AUTOMATION SETUP



Stage	Focus	Output
Stage 1	Clean Data + CRM hygiene	Clarity
Stage 2	SOPs + Delivery workflows	Consistency
Stage 3	Automation Layer	Efficiency
Stage 4	AI Assistant Layer	Acceleration

If you automate chaos, you scale chaos.

4. GAP ANALYSIS WORKSHEET

Circle your weakest two areas → these become your 90-day focus.

Category	Gap	Priority Action
Lead capture	_____	_____
CRM organization	_____	_____
Delivery SOPs	_____	_____
Billing	_____	_____
Reviews	_____	_____
Content cadence	_____	_____

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5. AI TECH STACK ESSENTIALS

Category	Tool	Category	Tool
CRM	GoHighLevel	Calendar + Intake	GHL booking forms
Automation	Make.com	Docs & SOPs	Google Drive + Notion
AI Assistant	GPT-5 + Voice agent	Payments & Invoicing	Stripe + GHL + PandaDoc

Tools don't scale companies. **Workflows do.**

6. 90-DAY AI UPGRADE ROADMAP

Phase	Focus	Actions
Month 1	Data & systems foundation	CRM cleanup, SOP docs, tagging
Month 2	Automation rollout	Follow-ups, booking, billing, reviews
Month 3	AI enablement	AI email assistant, AI voice agent, content helper

Target: unlock **10–30 hrs/month** capacity

Want a personalised AI readiness plan + automation blueprint?

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