

AI Readiness Checklist for Oakville Small Businesses

Ten plain-language questions to see whether AI could save your business time, and where to start. Tick each one you can answer “yes” to. The grey line under each question says why it matters.

- ☐ 1 **Can you name one task that eats at least two hours of your week?**
AI pays off fastest on a specific, repeated chore, not a vague goal.
- ☐ 2 **Is that task done roughly the same way each time?**
Repeatable steps are much easier to automate than one-off judgment calls.
- ☐ 3 **Do you know where the information for it lives (inbox, spreadsheet, booking system, accounting software)?**
Tools can only help if they can reach the information the task depends on.
- ☐ 4 **Do you know which AI features your current software already includes?**
Many tools you already pay for have AI built in, so you may not need anything new.
- ☐ 5 **Do calls or messages go unanswered when you're busy or after hours?**
Missed enquiries are lost work, and an AI receptionist can capture them for you.
- ☐ 6 **Do you have a written rule for what staff can and can't paste into AI tools?**
Customer details and passwords shouldn't end up in tools that weren't set up for them.
- ☐ 7 **Is anyone on your team already using AI tools on their own?**
Unofficial use is common, and it's better to guide it than to discover it later.
- ☐ 8 **Would your staff know how to check an AI answer before it goes to a customer?**
AI makes confident mistakes, so a quick review step protects your reputation.
- ☐ 9 **Do you have a monthly budget in mind for software and subscriptions?**
Most AI tools charge monthly or by usage, so knowing your limit narrows the options.
- ☐ 10 **Will you know what 'better' looks like, such as hours saved or faster replies?**
A simple before-and-after measure tells you whether the change was worth it.

Scoring: count your ticks. Every “no” is a good thing to bring to a conversation.

8–10: You're ready to set up or automate a specific task.

4–7: You're close. Pick one task and fill the gaps first.

0–3: Start by naming one task and writing a simple AI use rule for your team.

Want a second opinion on your answers?

Book a free 30-minute call. Bring the checklist and one real task. No commitment.

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