PART 01 — PROBLEM CLARITY

☐ **We have identified a specific business problem we want AI to help solve.**

☐ **We can describe the problem in one sentence without using the word 'AI'.**
e.g. "Our team spends 6 hrs/week manually formatting client reports."

☐ **We have agreed on what success looks like — with a measurable outcome.**
e.g. "Cut that time to under 1 hour within 60 days."

☐ **This problem is recurring, not a one-off situation.**

PART 02 — DATA & INFRASTRUCTURE

☐ **We are already collecting data relevant to this problem — even if it's messy.**

☐ **We know where that data lives and who owns it.**
e.g. CRM, spreadsheets, email, a specific platform

☐ **Our team has basic digital literacy — we use SaaS tools consistently.**

☐ **We have someone internally who can own the AI rollout day-to-day.**
This doesn't have to be technical — it's about accountability.

PART 03 — BUDGET & TIMELINE REALISM

☐ **We have a realistic budget that covers both the tool AND implementation time.**
The tool fee is often 20% of the real cost. Time is the other 80%.

☐ **We are not expecting results in under 30 days.**
Most AI integrations take 60-90 days to show meaningful ROI.

☐ **Leadership has bought in — this isn't just one person's idea.**

PART 04 — TEAM READINESS

☐ **Our team has been told about this initiative — it's not a surprise.**

☐ **We have addressed (or are ready to address) concerns about job displacement.**
Skipping this conversation is the #1 reason AI rollouts fail internally.

☐ **We have identified 1-2 early adopters who will champion the tool.**

PART 05 — VENDOR / TOOL VETTING

☐ **We are evaluating at least 2-3 tools, not just the one a vendor pitched us.**

☐ **We have asked each vendor: 'What does failure look like with your tool?'**
How they answer tells you more than any feature demo.

☐ **We understand the data privacy terms — especially for client or patient data.**
Critical for FinTech, Life Science, and healthcare-adjacent SMBs.

☐ **We have a 90-day exit plan if the tool doesn't perform.**

SCORE KEY

13-15 checked	8-12 checked	0-7 checked
You're ready. Let's find the right tool.	Strategy first, then tools.	Not yet. Start with a strategy session.