

Small Business AI Readiness Assessment

QUESTIONNAIRE PREP

This assessment is designed to give you a clear, personalized picture of where AI can help your business or organization — and where it's not worth the effort right now.

The quality of what you get back depends on what you put in. That's why we've built this in three phases: some preparation work you'll do over a few days, the questionnaire itself, and a quick review before you submit. None of it is rushed, and none of it is wasted.

Here's what the time commitment looks like:

- **Preparation** — 2 to 4 hours, spread across several days. You'll have conversations with employees, check a few details about your software, and confirm some things with whoever handles your budget. This is the foundation. It's not busywork — roughly 80% of your recommendations come from what you gather here.
- **Questionnaire** — 45 to 50 minutes, completed with your preparation in hand. 33 questions across six sections. Much easier and more accurate when the prep is done first.
- **Review** — 5 to 10 minutes to verify your responses before submitting.

Throughout the questionnaire, you'll see colored indicators showing how much weight a question carries:

Foundation question — your response shapes the entire recommendation framework. These determine which AI approaches are realistic for your situation.

Structural question — your response determines feasibility of specific AI categories and how complex implementation would be.

Whether you're just beginning to think about AI or you've already been experimenting with tools like ChatGPT, this process will meet you where you are. The goal isn't to push you toward the most advanced option — it's to find the right starting point for your team, your systems, and the way you actually work.

One note on privacy: please don't share confidential or sensitive information in your responses — things like customer records, financial data, or personally identifiable details. Use generalized descriptions instead. For example, say "large customer database" rather than specifying the exact number of records.

BEFORE YOU PICK YOUR TASKS — read this first

The most painful task and the best AI task are usually not the same thing. Pain often signals a broken process that needs a different kind of fix. The best AI tasks are ones where someone smart is spending time on work that's repetitive but requires judgment — and would rather be doing something more valuable. The profiles below will help you find that task.

Find the profile that sounds most like you.

Profile 1 — Just getting started Little or no AI experience, change feels slow or uncertain, systems are mostly separate, team is cautious.

Look for tasks where someone is doing a lot of writing, researching, or explaining. A staff member who drafts emails, prepares summaries, researches options, or answers the same kinds of questions repeatedly — that's your sweet spot. The goal is a thinking partner, not a replacement.

If a task that keeps coming to mind is mainly about moving data between systems or keeping records in sync, it's worth noting — just not your starting point. Those problems are real, but solving them requires a different kind of tool and a bit more setup than where you are right now. Note them, and come back to them once you have a first win under your belt.

Your first win looks like: one person, one task, saving 30–60 minutes a week on something they already do with their brain. Selecting two tasks should give you good options.

Profile 2 — Some experience, some momentum A few people have used ChatGPT or similar tools, you're mostly in the cloud, change is manageable when the benefit is clear, budget exists for a tool or two.

Look for tasks with a clear output — a report, a client communication, a proposal, a research summary. AI starts doing real work when it can help produce something, not just advise on it. Also worth looking at tasks where the same type of work repeats across different customers or situations.

You can start thinking about standalone tools designed for a specific job — something that fits into one part of your workflow without requiring everything to connect. A tool that drafts follow-up emails, summarizes meeting notes, or generates first-draft proposals from a few bullet points.

Your first win looks like: a specific repeatable output that takes half the time, with quality that's as good or better. Selecting two tasks should give you good options. If you have a strong third task, include it, but don't force one.

Profile 3 — Ready to go further Team is comfortable with technology, some systems already talk to each other, people are genuinely excited about what's possible, budget is real.

Look for tasks that cross systems — where data moves between platforms, where handoffs happen, where errors creep in because humans are doing what software should do. These are now worth tackling.

Also look at tasks where AI could handle a first pass that a human then reviews and approves — drafts, categorizations, summaries, flags. The human stays in the loop but stops doing the grunt work.

Your first win looks like: a workflow that runs with less human touch, freeing someone up for work only they can do. If you have a strong third task, include it, but don't force one.

Not sure which profile fits? Start with Profile 2. It's easier to move up than to recover from a project that outpaced your setup.

PHASE 1: PRE-WORK Total time: 2-4 hours, spread across several days

This preparation ensures your questionnaire responses are accurate and your recommendations are specific to your actual situation. The quality of what you get back depends entirely on what you put in here. Each section below can be done on its own schedule — you don't need to sit down and do this all at once.

Your Vision (15-20 minutes)

Before we get into the operational details, we want to understand what you're building toward.

Picture your business two or three years from now, after these changes have had time to take hold. What's different about how the work gets done — and what's different about how it feels to work there?

Think about one or two employees who will be most touched by this. What do you hope they'd say about the experience if someone asked them a year from now?

You'll also be asked what's already true about your organization — not your mission statement, but what your clients and your best people would say defines how you show up. This isn't something you need to research or discuss with stakeholders. But it's worth sitting with for a few minutes before you start. The best answers tend to come from instinct, not preparation.

One more thing, just for you: As you think about making this change, what are you most hopeful about — and what, if anything, are you most uncertain about? You don't need to include this in your Vision Summary for the questionnaire. But if you'd like to share it with your facilitator before your first session, they'd welcome it. It helps them show up for you, not just for the project.

Bring a 2-3 sentence vision summary to the questionnaire. This becomes the anchor for your entire assessment — it's what we check recommendations against to make sure they're serving what actually matters to you, not just what's technically possible.

Employee Conversations (45-90 minutes)

Talk to 3-5 employees about their most time-consuming repetitive work. You're looking for 2 strong task descriptions — a well-described second task is more valuable than a rushed third. If a genuinely strong third task comes up naturally, include it.

For each task, find out:

What the task actually involves — the specific activities, not just a label. "Updating addresses when members notify us, adding new members, reconciling differences between database and email lists" is useful. "Data entry" is not.

How many hours per week, and who does it. To get the most accurate numbers, we strongly recommend asking employees to track their actual time for one week before you complete the questionnaire. If that's not feasible, get the best estimate from the person actually doing the work — not your guess from the outside. We'll note the confidence level either way.

What software they use for each task — names, what they do with it, and what data they work with in each system. Most tasks touch 1-3 tools. Write down the specifics while you're talking, because you'll need them for the IT/Admin Verification section later.

Which part of the task takes the longest or causes the most frustration.

Whether any regulated data is involved — things like Social Security numbers, medical records, legal case files, credit card numbers, or credit reports. Just note what's present; don't include the actual data.

A few tips: Verify task descriptions with the people doing the work, not just managers. Include at least one entry-level employee if possible. And keep track of which software systems come up — that's your list for the IT/Admin Verification section.

Bring your completed task descriptions, hours, job titles, software details, and any regulated data flags to the questionnaire. This single section drives roughly 80% of your AI recommendations. Rushed estimates or vague descriptions lead to generic suggestions that won't fit your situation.

Employee Context (20-30 minutes)

This can happen during the same conversations as above or separately — but it's a different kind of question, so it helps to know that going in. You're shifting from "what do you do" to "who are you and what could you be doing."

For each employee involved in the tasks above, ask:

What are your top strengths? Have them pick up to 3 from this list: Strategic thinking, Problem-solving, Communication, Technical/analytical skills, Creativity, Organization, Relationship-building, Teaching/training others, Initiative/self-direction.

Are you interested in learning new skills or taking on different responsibilities? Note their level: very interested, somewhat interested, prefers current role, or unknown.

If we could free up a few hours a week from these repetitive tasks, what higher-value work would you want to help with? Encourage them to think about work that uses their strengths or helps with the business goals you care about most.

Once you've had these conversations, decide which one task from your list you'd most want to address first — and think about why. Time saved? Biggest bottleneck? Highest frustration? Greatest gap between what that employee is doing now and what they could be doing? Trust your instinct here. You know your business and your people better than anyone.

Bring each employee's strengths, learning interest, and ideas for higher-value work, along with your top priority task and a brief reason why. This shapes how we recommend redirecting the time AI frees up — not just saving hours, but putting them somewhere that multiplies value for your business.

IT/Admin Verification (30-60 minutes)

Now that you know which software systems your tasks depend on, verify the following for each one. Most tasks touch 1-3 tools, so you're likely checking 4-9 systems total across all your tasks.

For each system, confirm:

Your plan level — Free, Basic, Pro, etc. Check Settings > Billing or a recent billing email. Don't guess.

Admin access — Can you log in independently and manage the account, or are you a standard user? If the account is registered to a former employee, volunteer, or someone outside your organization, resolve ownership before proceeding.

Data export — Can you download your data in a usable format (CSV, Excel) on your own, without contacting the vendor? Don't assume the option exists — look for it in Settings > Data or within the module you use. If you find it, test it with a small export.

Integration or API access — Does the tool connect to other systems, or offer API access on your current plan? Check Settings > Integrations or search "[tool name] API documentation."

If any tool is a legacy system — older software, runs on a specific computer, set up by someone no longer with the organization, or stores data you've never tried to extract — attempt a test export before the questionnaire. If you can't get data out, or what comes out is unusable, that task may need to be rescoped around data you can actually access. If you're unsure whether a system qualifies as legacy or need help working through a verification you can't resolve, see the Tech Stack Verification Guide, starting at Step 1B.

A note about "don't know" answers: Systems where export or integration capability can't be confirmed won't be included in your base recommendations. This isn't a penalty — it protects you from a plan built on something you can't verify. Your assessment will document the potential value separately, so nothing is lost. It's just handled with honesty rather than assumptions.

Bring software names, plan levels, admin access status, export test results, and integration capability for every system in your tasks. Your existing software determines which AI tools can actually work with what you have. Verified details lead to specific, actionable recommendations. Unverified systems get documented as expansion opportunities — real potential that's noted but doesn't inflate your core plan.

Leadership & Budget (15-20 minutes)

These are three separate conversations or reflections, but they're all quick and independent of the other prep work. Do them whenever it's convenient.

Change readiness. Talk with co-owners or leadership about your team's actual comfort with change — based on past experience, not hopes. Think about how previous technology adoptions went. Where did you hit resistance? What went smoother than expected? Be honest about your organization's track record. Overestimating here leads to recommendations that move too fast for your team.

Budget. Confirm a realistic monthly budget for new technology tools with whoever has spending authority. This is specifically for new tools — not your total IT budget or existing software costs. It should reflect what you can sustain monthly for 12+ months, not a one-time stretch.

Tech level. You'll be asked to self-assess your company's technology sophistication on a 1-5 scale. The full descriptions are in the questionnaire, but start thinking honestly about where you are today — not where you want to be. Consider your team's actual comfort with current systems and your real experience with technology adoption.

Bring your change readiness assessment, confirmed monthly budget for new tools, and an honest read on your current tech level. These three inputs together shape the pace, complexity, and scale of every recommendation. Getting them right means a plan you can actually execute. Getting them wrong — in either direction — means recommendations that either overwhelm your team or leave value on the table.

Understanding AI Tool Types (10-15 minutes)

Read the descriptions below so you understand what each type of AI tool does and what it asks of your team. You'll be choosing between them in the questionnaire.

Conversational AI — This is AI you talk to. You describe what you need, it produces a draft, an answer, a revision, or a thinking-through. Your team works with it the way they'd work with a sharp colleague who writes fast and never gets tired.

What it handles well: Drafting emails, proposals, and client communications. Rewriting something that isn't landing. Summarizing long documents. Thinking through a decision by talking it out. Researching options. Preparing talking points. Helping someone who knows what they want to say get it on paper faster.

What it doesn't solve: Problems that live in your systems — data stuck in disconnected tools, work that requires automated handoffs between people, processes that need tracking or triggers. It helps you write the follow-up email, not figure out which follow-ups are overdue.

What it asks of your team: A subscription, some training on how to use it effectively, and a willingness to experiment. No new platforms to manage. No data to migrate. Minimal disruption.

Standalone Software Tools — These are purpose-built platforms designed for a specific job. You upload information or connect a data source, the tool processes it, and you get a structured result. Think scheduling tools, document processors, content pipelines, or workflow organizers. They run independently — they don't need to plug into your existing systems.

What they handle well: Repeatable work with clear inputs and outputs. Giving structure to processes that conversation alone can't organize. Solving problems that are about coordination and process, not just writing or thinking.

What they don't solve: Adoption. The tool only works if someone uses it consistently. If the person responsible is already stretched thin or uncomfortable with new platforms, the software risks sitting unused regardless of how good it is.

What they ask of your team: Time to evaluate and select the right tool. Time to learn it. Someone willing to own it and build it into their routine. The value is real but so is the effort to get there.

Still not sure which fits? These questions can help — you don't need to write anything down, just notice where your honest answer lands:

When you picture the problem you most want to solve, is it mainly about speed and quality — getting things written, drafted, or thought through faster? Or is it about things falling through cracks — missed steps, lost handoffs, no way to see where something stands?

Do you have someone on your team who would willingly own a new software tool — learn it, use it daily, troubleshoot when it acts up? Does that person come to mind easily, or are you struggling to think of who it would be?

If you added a new platform to your team's workflow tomorrow, would it simplify their day or add one more thing to manage?

This prepares you for one of the early questions in the questionnaire. Neither option is better — what matters is which one your team can realistically adopt and sustain. Choosing conversational AI only doesn't close the door on software tools later. Your assessment will note any deferred opportunities so nothing is lost.

Ready to begin the questionnaire?

Before moving on, confirm you've completed:

- Vision summary written
- Employee conversations done — tasks, hours, software details gathered
- Employee context gathered — strengths, interests, higher-value work ideas, priority task identified
- IT/Admin verification complete — plan levels, access, export, and integrations confirmed or flagged
- Leadership & budget conversations done — change readiness, monthly budget, tech level assessed
- AI tool types reviewed

Estimated time to complete the questionnaire with your gathered information: 45-50 minutes

What happens next:

With your preparation complete, you're ready to answer the 33 questions in the core questionnaire. Each question will reference the information you've gathered, making completion more efficient and accurate.

The questionnaire follows immediately in the next section.

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PHASE 2: CORE QUESTIONNAIRE (40-55 minutes)

Have you completed the Pre-Work Checklist?

This questionnaire is designed to be completed with information gathered during your preparation phase. If you haven't completed the Pre-Work Checklist in Document 1, please return to that section first. The quality of your recommendations depends on having verified information ready before you begin.

Quick Reference - Information You Should Have Ready:

- Employee task data with actual hours (Q9)
- Software inventory with details verified (Q9, Q10)
- Your Vision Summary (Q3)
- Team change comfort assessment (Q19)
- Current technology level honest evaluation (Q24)
- Confirmed budget for new tools (Q25)

Ready to begin? Let's start with your business overview.

Estimated completion time: 45-50 minutes

Section 1: Business Overview (5-7 minutes)

This section establishes your business context and baseline AI familiarity.

1. **Company name:** _____

2. **Contact name:** _____ **Email (for any questions)**

3. Your vision summary:

Summarize your vision in two or three sentences — the business outcome, and what it means for the people in it. Write it the way you'd want someone to hand it back to you when things get hard.

4. **Overall familiarity with AI (Select 1-5):** _____

FOUNDATION QUESTION | READ ALL OPTIONS CAREFULLY | BE HONEST, NOT OPTIMISTIC

Why this matters: Your AI familiarity level determines the complexity and type of recommendations you'll receive. Selecting a level too high leads to recommendations beyond your team's current capabilities. Selecting too low limits opportunities you could actually handle. Better to be honest and succeed than optimistic and struggle.

Before answering:

- Consider your team's actual experience, not isolated experiments
- Think about consistent usage, not one-time trials
- Be honest about your current state, not your desired state

Select ONE level:

1 - No Experience: "Our company hasn't used any AI tools and we have limited understanding of what AI can do for businesses."

2 - Basic Exposure: "Some team members have tried ChatGPT or similar tools for simple tasks like writing emails or answering questions, but we haven't explored business applications as a company."

3 - Regular Usage: "Our team regularly uses AI tools for various tasks (writing, research, brainstorming) and we understand some ways AI could help improve our business operations."

4 - Business Implementation: "We actively use AI tools in our business operations and have experimented with integrating AI into our workflows or processes across multiple departments."

5 - Advanced Integration: "We have extensive experience with multiple AI tools, have successfully implemented AI solutions throughout our business, and actively stay current with AI developments to maintain our competitive advantage."

Your Answer: _____

4b. Which implementation path fits where you are right now?

(Select one) FOUNDATION QUESTION | PRE-WORK REFLECTION ENCOURAGED

Why this matters: Your path choice determines the scope of your entire recommendation. Neither is better — what matters is which one your team can realistically adopt and sustain. Choosing Option A doesn't close the door on Option B. Many businesses get the most value by starting with conversational AI, building confidence, and adding software tools later. Your assessment will note any deferred opportunities so nothing is lost.

Before you choose, one thing worth considering: The most capable option and the most valuable option aren't always the same. A frustrating, manual process might sound like it needs software — but if the person who'd use that software is already stretched thin, a new platform can make things harder before it helps. And standalone software tools deliver the most value when someone on your team has the time, interest, and motivation to own them. If that person exists, Option B is worth the stretch. If not, Option A gives you real value now.

Option A — Conversational AI Only AI as a thinking and writing partner. No new platforms, no integrations. Your team works with AI through conversation to improve the work they're already doing.

Option B — Conversational AI + Standalone Software Tools Everything in Option A, plus purpose-built software for specific workflows. Tools operate independently from your existing systems but require someone to learn and maintain them.

Brief reason for your choice: _____

5. What is your primary business focus and main products/services?

5b. Your Character

Comment [1]: we need to integrate into each of the three frameworks and it must feature prominently in existing sections saying this was their choice

This isn't your mission statement. It's what's actually true about you.

The people you serve — clients, community, whoever knows you best — if they were describing your organization to a friend, what would they say matters most about how you work? Not what you do, but how you show up.

And from the inside: what do your best people know to be true about this organization that wouldn't be obvious from the outside?

What are you motivated to keep, regardless of what technology offers?

6. How many employees do you have and what are their main roles?

STRUCTURAL QUESTION

Why this matters: Your workforce structure determines how AI recommendations consider workforce protection and capability development. Knowing all roles helps ensure recommendations support your entire team.

Instructions: List all employees with their actual job titles or primary roles. Names should not be included, if needed use initials.

7. What are your top two strategic business challenges (e.g., market competition, growth barriers, customer acquisition, regulatory changes) that impact your success?

Why this matters: Understanding your strategic challenges helps align AI recommendations with your most pressing business needs.

8. What is your most important business goal for the next year?

Why this matters: Your primary goal shapes prioritization of AI opportunities and ensures recommendations support what matters most to your business.

Section 2: Current Operations (10-15 minutes)

This section contains several of your highest-impact questions. Most accurate when pre-work consultation is complete.

9. Time-Consuming Tasks

FOUNDATION QUESTION | EMPLOYEE CONSULTATION REQUIRED (from pre-work)

Why this matters: This single question determines approximately 80% of your AI application recommendations. Task information with accurate hours helps create the most value for your business. Rushed estimates or missing details lead to mismatched recommendations that waste your investment.

Before answering:

- Complete employee consultation from pre-work checklist
- Use actual tracked time, not rough estimates
- Include all people involved in each task
- Be specific about what the task actually involves
- Gather software and data details while discussing the task with employees

Instructions: Provide complete details for your 2-3 most time-consuming manual or repetitive tasks using the format below. Tasks 1-2 are recommended. Task 3 is optional if you have a strong task - quality matters more than quantity.

TASK 1 (Q9A) - REQUIRED

TASK OVERVIEW

Task summary: [5-7 words] (*IE- managing multiple records across four systems*)

What this task involves: [List the main activities, separated by commas] (*e.g., "updating addresses when members notify us, adding new members, reconciling differences between database and email lists, preparing quarterly updates"*)

Performed by: [Job Title] - [hours/week]

Time estimate confidence: Tracked (actual time logs from employee) High confidence estimate (discussed with employee doing the work) Rough estimate (best guess)

Which component/part takes the most time or causes the most frustration? [Brief explanation]

EMPLOYEE CONTEXT

Top strengths (select up to 3): Strategic thinking Problem-solving Communication Technical/analytical skills Creativity Organization Relationship-building Teaching/training others Initiative/self-direction

Interest in learning: Very interested in learning new skills Somewhat interested in learning Prefers to stay in current role Unknown

SOFTWARE USED IN THIS TASK

If you completed the IT/Admin Review in the pre-work, you should have this information ready. If not, gather it now — accurate details here drive the quality of your recommendations. If you encounter a system you can't verify, see the IT/Admin Review section of the pre-work checklist, or the Tech Stack Verification Guide for step-by-step help.

For each software system this employee uses to complete this task, provide the details below. If they use 3 software systems, complete this section 3 times.

SOFTWARE 1: [Name — e.g., "QuickBooks Pro," "Microsoft Excel," "Gmail"]

What you use it for in THIS task: [Brief description — e.g., "Creating invoices and tracking payments"]

What data does this employee work with in this system for this task? [e.g., "Customer invoices and payment history," "Member contact records," "Project timelines"]

How organized is the data in this system: Very organized — Easy to find anything in under 2 minutes Mostly organized — Usually know where to look Somewhat scattered — Takes searching to find things Disorganized — Hard to locate information

Type: Cloud-based (accessible from web browser) Desktop software (installed on specific computers) Mobile app only

Admin access: Yes — I can add users, change settings, manage the account No — Limited user account Don't know — *Systems without confirmed admin access may be assessed separately from your base recommendations. See IT/Admin Review in the pre-work if you need help resolving this.*

Data export — can you download your data in a usable format (CSV, Excel) without contacting the vendor? Yes — confirmed by testing Yes — I know the option exists but haven't tested it No — data can only be viewed inside the system Don't know — *Systems without confirmed export capability won't be included in your base recommendations. Your assessment will document the potential value separately. See the Tech Stack Verification Guide, Step 4, if you need help checking this.*

Currently connects to other systems automatically: Yes — connects to: [list what it connects to] No — I copy information manually between programs Don't know — *Same as above — unconfirmed integration capability means this system is assessed separately. See the Tech Stack Verification Guide, Step 5, for how to check.*

Subscription/version: [e.g., "Free tier," "Pro plan," "Business Standard," "Excel 2019"]

SOFTWARE 2: [Same format as Software 1]

SOFTWARE 3: [Same format as Software 1]

OTHER DATA SOURCES USED IN THIS TASK

This section is for data involved in this task that does NOT live in any of the software systems you described above — old files, paper records, data in systems you no longer actively use but still reference. If all of the data for this task lives inside the systems you already described, skip this section.

DATA SOURCE 1: [e.g., "Old Excel spreadsheet with pre-2020 purchase records," "Paper client intake forms," "Access database from previous office manager"]

What this data is used for in this task: [Brief description — e.g., "Looking up historical pricing when creating new quotes"]

Where is this data stored: Spreadsheets (Excel, Google Sheets) saved locally Local computer files or folders Older software no longer in active use (describe: _____)
 Email Paper files Other: _____

Can you access and export this data in a usable format (CSV, Excel)? Yes — confirmed by testing No — data is locked, inaccessible, or in an unusable format Don't know — *If this is an older system or database you're unsure about, see the Tech Stack Verification Guide, Step 1B, for help determining whether the data is accessible.* Not applicable (already in accessible format, e.g., a spreadsheet)

How organized is this data: Very organized — Easy to find anything in under 2 minutes Mostly organized — Usually know where to look Somewhat scattered — Takes searching to find things Disorganized — Hard to locate information

DATA SOURCE 2: [Same format as Data Source 1, if applicable]

REGULATED DATA INVOLVED

Does this task involve any of the following? Check all that apply:

Employee Social Security Numbers or Tax IDs Medical/health information or insurance records Legal case files or privileged attorney-client documents Customer credit card numbers or bank account information Credit reports or background check results **None of the above**

If you checked any boxes above, briefly describe how this data is involved: [Text field - 150 characters]

TASK 2 (Q9B) - REQUIRED

[Same complete format as Task 1 - all sections: Task Overview, Employee Context, Software Used, Data Accessed, Regulated Data]

TASK 3 (Q9D) - OPTIONAL BUT STRONGLY RECOMMENDED

[Same complete format as Task 1 - all sections: Task Overview, Employee Context, Software Used, Data Accessed, Regulated Data]

Why we recommend 3 tasks: More tasks give us better options after our AI scoring process accounts for automation potential, business impact, and workforce considerations. This increases your chances of getting 3 strong, actionable recommendations rather than just 1-2.

10. Software Check - potential substitutions

We'll focus our main recommendations on your current software setup. However, if you already have access to more capable software that you're not currently using for these tasks, we can identify potential upgrade opportunities as future enhancements.

Examples: You use Excel desktop but have Google Workspace available; you manually track things but have an unused project management tool; you use basic software but have a more advanced version available.

ONLY list software that would be a clear UPGRADE (better integration, cloud access, or collaboration features).

SOFTWARE NAME: _____

What we have: [e.g., "Google Workspace Business plan" or "Unused Asana subscription"]

Current use (if any): [e.g., "Only using Gmail, not using Sheets/Drive" or "Not being used at all"]

Could potentially replace/supplement: [Which software from Q9 tasks]

Why it might be better: [e.g., "Cloud-based instead of desktop," "Better integration," "Already paying for it"]

Why we're not currently using it for these tasks: [Brief explanation]

[Repeat format for each alternative software]

11. Data Storage Alternatives

Comment [2]: REVIEW

This is optional. If you have access to better data storage options that you're not currently using, we can note how organizing or migrating this data could enhance your future AI opportunities.

Examples: Data scattered in email but you have organized cloud storage available; files stored locally but you have centralized systems unused.

ONLY list storage that would be a clear UPGRADE (better organization, accessibility, or integration).

STORAGE SYSTEM: _____

What we have: [e.g., "Google Drive (1TB)" or "Unused SharePoint subscription"]

Current use (if any): [e.g., "Random document storage, no organization" or "Not being used"]

Could potentially store/organize: [Which data type(s) from Q9 tasks]

Why it might be better: [e.g., "Centralized instead of scattered," "Better search," "Automatic backup"]

Why we're not currently using it for this data: [Brief explanation]

[Repeat format for each alternative storage system]

12. Do you use any cloud-based or online storage systems? If so, which ones?

STRUCTURAL QUESTION

Why this matters: Cloud storage systems often enable easier AI integration than local-only storage.

Section 3: AI Potential (8-10 minutes)

This section explores strategic priorities and AI opportunities.

13. AI and Your Team

STRUCTURAL QUESTION

Why this matters: Understanding both your motivation for AI adoption and your team's readiness helps us calibrate implementation pacing and support levels to your actual situation.

13a. What motivates you to explore AI for your business? What do you hope it changes about how your team works? and what role do you see AI playing alongside your employees?

Your Answer: _____

13b. How would you describe your team's current feeling about AI becoming part of how they work? (Select 1-5):

BASE ON ACTUAL CONVERSATIONS, NOT ASSUMPTIONS

1 — Resistant: Team actively pushes back on AI discussion, sees it as a threat to their roles or way of working.

2 — Nervous: Team is uncomfortable, has concerns about AI replacing their work or changing things too fast.

3 — Neutral: Team hasn't expressed strong feelings either way, waiting to see how it plays out.

4 — Curious: Team has shown interest, asking questions, some may have tried tools on their own.

5 — Enthusiastic: Team is actively excited, bringing ideas, eager to get started.

Your Answer: _____

14. Top Priority & Strategic Redirect

STRUCTURAL QUESTION | **CONSIDER BUSINESS IMPACT**

Why this matters: Your selection here becomes your highest priority AI implementation recommendation. Understanding where freed-up time could be redirected helps us show the full strategic value of automation—not just time saved, but how that time could multiply value for your business.

14a. Which ONE task from Question 9 would you most want to address with automation or AI tools?

Instructions: Select ONE task from Question 9 and explain your primary reason for prioritizing it.

14b. If we freed up this time, what higher-value work could this employee focus on?

Instructions: Think about work that would help with your business goals (from Q7/Q8) or work this employee is uniquely good at based on their strengths (from Q9).

Example: "She could spend more time on client onboarding and relationship building, which aligns with our goal of improving retention. Her communication and problem-solving skills would be perfect for this."

Your Answer:

15. How do you currently make business decisions based on your data?

Why this matters: Understanding your decision-making processes helps identify opportunities for AI-enhanced analytics and insights.

16. Based on what you told us matters most about your business — your team, your reputation, your customer relationships — what feels at risk if AI becomes part of how you operate?

Why this matters: You've already told us what you're hoping AI changes. This question is the mirror — it surfaces what you'd least want to lose in that process. The answer shapes how we present the plan and what we make sure to visibly protect in the recommendation, not just avoid technically.

Comment [3]: new 26apr

17. For each employee involved in the tasks above, describe any AI tool experience they've had — what they tried, how it went, and whether they're still using it. If you're unsure about someone specific, just note that. More broadly, has your team experimented with any AI tools as a group?

Why this matters: Individual experience — positive or negative — helps calibrate recommendation complexity and surface lessons already learned.

17b. Is there anything about the employees in your Question 9 tasks you'd want us to know before your first session? Hopes, hesitations, personal circumstances, anything that feels relevant. A few sentences is plenty.

Comment [4]: new 26apr

Why this matters: This is your chance to add context that doesn't fit neatly into any other question. It stays with your facilitator, not the report.

18. What do you plan to do with the report once you get it? (i.e., start a pilot project, use it to jumpstart further research, etc.)

Why this matters: Understanding your intended use helps format recommendations appropriately for immediate action versus long-term planning.

Section 4: Team Adaptation (5-7 minutes)

This section assesses organizational readiness for change and implementation.

19. How comfortable is your team with change? (Select 1-5):

FOUNDATION QUESTION | LEADERSHIP ALIGNMENT REQUIRED (from pre-work) |
BASE ON PAST EXPERIENCE

Why this matters: Your team's comfort with change determines implementation timelines, complexity levels, and support requirements for all AI recommendations. Overestimating means recommendations will be too advanced and move too quickly for your team to adopt successfully. Underestimating means you'll miss opportunities your team could handle. This affects every AI solution recommended.

Before answering:

- Complete leadership alignment from pre-work checklist
- Base assessment on past technology adoptions, not aspirations
- Consider actual resistance or enthusiasm you've encountered
- Think about your organization's track record with change
- If you haven't done the pre-work alignment, pause here and complete it

Select ONE level:

Level 1 - Change Resistant: Past changes have faced significant resistance, slow adoption even with clear benefits, requires extensive support and convincing.

Level 2 - Change Novice: Cautious about change, needs proven results before committing, prefers guidance throughout transitions.

Level 3 - Change Neutral: Accepts necessary changes, neither resistant nor enthusiastic, pragmatic approach to new initiatives.

Level 4 - Change Positive: Generally embraces change when benefits are clear, adapts relatively quickly, some early adopters in team.

Level 5 - Change Ready: Actively seeks improvement opportunities, quick to adopt new approaches, minimal resistance to well-explained changes.

Your Answer: _____

20. Looking at the inefficient processes from Question 9, which ONE of these causes the most stress or frustration for your employees, and why?

STRUCTURAL QUESTION | EMPLOYEE INPUT VALUABLE

Why this matters: Your selection here becomes a priority for improving employee satisfaction and workplace quality. Addressing frustration points can improve retention and morale alongside productivity.

Instructions: Select ONE task from Question 9 and explain why it causes stress or frustration.

21. How do you currently handle employee training for new tools?

STRUCTURAL QUESTION | DESCRIBE ACTUAL APPROACH

Why this matters: Your current training approach shapes the format and support level required for AI implementation recommendations.

Instructions: Be specific about your actual training approach, not aspirational plans.

22. What would help your team feel more confident about working with AI? (Check all that apply):

Hands-on training Seeing successful examples from similar businesses Step-by-step implementation guides Clear understanding of how it affects their role Other:

23. How does your organization typically handle the implementation of major changes? (Select all that apply):

Top-down directives Employee-led initiatives Change management team External consultants Ad-hoc approach No formal process

Section 5: Innovation Readiness (5-7 minutes)

This section contains multiple foundation questions. Most accurate with stakeholder consultation.

24. Select your company's tech level (Select 1-5):

FOUNDATION QUESTION | READ ALL OPTIONS TWICE | CURRENT STATE ONLY

Why this matters: Your current technology sophistication determines which AI tools can integrate with your existing systems and which require infrastructure you don't yet have. Lower tech levels may restrict access to more advanced AI integration options, while higher levels unlock automation opportunities. This is about where you ARE today, not where you want to be.

Before answering:

- Read all 5 descriptions completely (twice)
- Select based on current state, not aspirations or future plans
- Consider your actual comfort with technology adoption
- Think about your team's actual capabilities with current systems

Select ONE level:

Tech Level 1 – "Relies primarily on manual processes and minimal digital tools. Limited experience with software beyond basic email and office applications. Little to no structured IT infrastructure."

Tech Level 2 – "Uses essential digital tools like spreadsheets, cloud storage, and basic software but often struggles with integration. Hesitant about adopting new technology without clear guidance and support."

Tech Level 3 – "Core business processes are digitized. Uses integrated systems effectively. Regular technology adoption, though may be cautious with cutting-edge solutions."

Tech Level 4 – "Actively integrates digital solutions across business functions, leveraging data for decision-making. Comfortable with adopting emerging technologies but may lack a dedicated AI strategy."

Tech Level 5 – "Highly digital-first, with advanced automation, AI-driven decision-making, and strong data analytics. Continuously explores and adopts cutting-edge technology to maintain a competitive edge."

Your Answer: _____

25. What's your approximate monthly budget for NEW technology tools and software?

FOUNDATION QUESTION | DECISION-MAKER CONFIRMATION REQUIRED (from pre-work) | BE REALISTIC

Why this matters: Budget for new technology determines which AI implementation pathways are sustainable for your business. This shapes the scale and type of solutions recommended. This is specifically budget for NEW tools and software (not your total IT budget or existing software costs). Being realistic ensures recommendations you can actually afford and sustain long-term.

Before answering:

- Complete budget confirmation from pre-work checklist
- This number should come from someone authorized to allocate funds
- Reflect sustainable, recurring monthly investment in NEW tools
- Consider this is additional to existing software costs
- Think about realistic monthly spend you could maintain for 12+ months
- If you haven't done the pre-work confirmation, pause here and complete it

Instructions: Provide approximate monthly budget for NEW technology tools and software.

Your Answer: _____

26. Who would be responsible for implementing new technology solutions? (someone in the company or an external tech vendor)

STRUCTURAL QUESTION | NAME SPECIFIC PERSON/ROLE

Part A — Who handles your technology? (Select one)

Internal

- Internal - Dedicated IT staff or tech team** — technology is their primary role
- Internal - Staff member with tech experience** — capable with technology but it's not their main job
- Internal - We find someone when needed** — no established person; we'd go looking when something comes up

External

- External - We hire as needed — one off** — freelancer, consultant, or vendor hired for a specific job; no ongoing relationship
- External - We hire as needed — standing** — someone we call regularly but no formal contract
- External - MSP — Basic/Partial** — ongoing contract covering specific areas like devices, security, or helpdesk
- External - MSP — Full service** — ongoing contract, actively manages your infrastructure, has admin access to most or all of your systems

Notes _____

Part B — How capable are they with new tools and integrations? (Select one) **Strong** — has done integrations, automation, or similar implementation work **Moderate** — handles standard IT well, limited experience with integrations or new platforms **Basic** — keeps existing systems running, unlikely to lead new implementations

Notes _____

Other notes _____

27. How does your organization typically adopt new business tools?

Why this matters: How a team absorbs change shapes the implementation structure we build — pacing, check-in cadence, and how much structure is needed before people use tools

independently. This question is about your organization as a whole, not individual preferences or how you'd like the program delivered.

28. In the past 2 years, how has your organization responded to new technology initiatives? (Select 1-5):

STRUCTURAL QUESTION | BASE ON ACTUAL HISTORY

Why this matters: Past technology response patterns predict future implementation success and help calibrate recommendation timelines.

Instructions: Base selection on actual history, not intentions or one-time successes.

Select ONE level:

1 - Strong resistance, rarely adopted 2 - Cautious, slow adoption after proven success elsewhere 3 - Neutral, adopted when required or clearly beneficial 4 - Enthusiastic early adoption when value is clear 5 - Proactive innovation leaders, seeking competitive advantage

Your Answer: _____

Section 6: Data Security and Privacy (8-10 minutes)

This section assesses security and compliance requirements.

Q29: Pre-Screen Confirmation *"Just to confirm: Your business does NOT provide licensed professional services (medical, legal, financial advisory) to clients, correct?"*

- Correct - we do not provide licensed professional services
- Actually, we do provide [text field]

Q30: Data Types Verification *"Looking back at the data types you checked in Q9 for your tasks, does your business regularly collect, store, or process ANY of the following regulated data? Check all that apply:"*

- Medical/health records or insurance information
- Financial account information or credit reports

- Social Security Numbers (beyond payroll processing)
- Legal case files or attorney-client communications
- Student academic records
- **None of the above**

Q31: AI Data Access Intent *"Thinking about the AI tools you want to implement, will they need to directly access, read, or process any of the following types of information?"*

Check all that apply:

- Medical/health information (patient records, insurance claims, health assessments)
- Financial account data (bank accounts, credit card info, investment accounts)
- Legal documents (case files, contracts requiring attorney review, privileged communications)
- Social Security Numbers or Tax IDs (beyond standard payroll)
- Credit reports or background check results
- Employee personnel files (performance reviews, disciplinary records, medical accommodations)
- Student academic records or education data
- **None of the above - AI will only work with general business information**
- Not sure what AI will need to access

Q32: Current Data Practices *"How do you currently handle sensitive business information?"*

- Specialized industry software (EMR, practice management, legal case management)
- General cloud storage (Google Drive, Dropbox)
- Email and shared documents
- Paper files only
- We don't handle sensitive documents

[If "Specialized industry software" selected: FLAG - Tier 3 businesses shouldn't be using EMRs/legal practice management]

Comment [5]: what to do with this (and update google form for q29-33)

Q33: Client-Facing AI Intent *(from earlier suggestion - still relevant) "Will any AI tools you implement interact directly with YOUR customers?"*

- Yes, AI will communicate directly with customers
- No, AI is only for internal operations
- Unsure

PHASE 3: REVIEW AND SUBMISSION (5-10 minutes)

Before Submitting - Please Verify:

CRITICAL ITEMS TO VERIFY:

Q9 VERIFIED: I confirmed all 3 tasks with the employees who actually do them

- Hours are actual tracked time (not estimates)
- All roles involved are included
- Task descriptions are specific and accurate

Q10 COMPLETE: I verified software details with IT/admin or by checking systems directly

- Subscription levels confirmed
- Integration history checked (or marked "Don't Know")
- Admin access verified

Q19 ACCURATE: I discussed change comfort with leadership and based selection on past experience (not aspirations)

Q24 ACCURATE: I read all 5 tech level descriptions twice and selected based on current state (not desired future state)

Q25 AUTHORIZED: Budget number is for NEW tools (not total IT budget), comes from decision-maker with spending authority, and reflects sustainable recurring investment

All information provided is accurate to the best of my knowledge

I have not included any confidential or sensitive information

Wrapping Up

Do you have any feedback on using this questionnaire? (time, clarity, preparation process, etc.)

Thank you for taking the time to complete this assessment!

We look forward to providing you with your personalized AI readiness assessment and recommendations in the next few days. Your investment of time in gathering accurate information will result in recommendations specifically tailored to your business's actual capabilities and needs.

As you continue on your journey with new technology, if there is anything we can do to help, please let us know.

Data Privacy

Your privacy and data security are paramount to us. We take several concrete steps to protect your information: all data you share remains strictly confidential and is never shared with third parties. We maintain secure data handling practices throughout our workflow and implement specific measures to ensure your information remains private and protected. The AI assistant we use, Claude.ai, is known for its commitment to safety and data privacy. We understand that trust is earned through consistent actions, which is why we've made data privacy a cornerstone of our operations. If you have any questions about our privacy practices, please don't hesitate to reach out.