

AI Business Readiness Assessment

For professional-service owners considering AI and automation

Purpose. Use this private worksheet to decide whether a paid consultation is the right next step. Complete it in about 15 to 20 minutes. You do not need to provide exact revenue, private client information, employee details, passwords, or the completed worksheet to AI Consultant in Marin.

How to answer. Mark Yes, Partly, or Not yet. Use ranges, trends, and ordinary examples. The objective is an honest readiness decision—not a perfect score.

1. A clear business problem

1. I can name the specific business problem, recurring stress, missed opportunity, or disliked task that deserves attention first.

☐ Yes ☐ Partly ☐ Not yet

Notes or evidence: _____

2. I can describe what a better result would look like without relying on vague promises.

☐ Yes ☐ Partly ☐ Not yet

Notes or evidence: _____

3. The problem matters enough to act on during the next 90 days.

☐ Yes ☐ Partly ☐ Not yet

Notes or evidence: _____

4. I understand who is affected and why solving it would improve the business or client experience.

☐ Yes ☐ Partly ☐ Not yet

Notes or evidence: _____

2. Usable evidence and a baseline

5. I can describe the current process from beginning to end, including where it slows down or breaks.

☐ Yes ☐ Partly ☐ Not yet

Notes or evidence: _____

6. I have ranges, trends, examples, or records that show current performance without exposing unnecessary sensitive figures.

☐ Yes ☐ Partly ☐ Not yet

Notes or evidence: _____

7. I can select one to three indicators that would show whether meaningful progress occurred.

☐ Yes ☐ Partly ☐ Not yet

Notes or evidence: _____

8. I know where the information needed for this project is stored and who may use it.

☐ Yes ☐ Partly ☐ Not yet

Notes or evidence: _____

3. Operational stability

9. The business can meet ordinary client and employee obligations while a new system is being introduced.

☐ Yes ☐ Partly ☐ Not yet

Notes or evidence: _____

10. The current process is understood well enough to improve rather than automate confusion.

☐ Yes ☐ Partly ☐ Not yet

Notes or evidence: _____

11. A failed test can be paused without creating unacceptable harm.

☐ Yes ☐ Partly ☐ Not yet

Notes or evidence: _____

12. The business is not depending on automation to rescue an immediate crisis that needs direct human attention first.

☐ Yes ☐ Partly ☐ Not yet

Notes or evidence: _____

4. Ownership, authority, and capacity

13. One owner or sufficiently authorized manager will be accountable for implementation between meetings.

☐ Yes ☐ Partly ☐ Not yet

Notes or evidence: _____

14. That person can approve access, decisions, testing, and changes within a reasonable time.

☐ Yes ☐ Partly ☐ Not yet

Notes or evidence: _____

15. The accountable person can devote approximately one to three hours per week when required.

☐ Yes ☐ Partly ☐ Not yet

Notes or evidence: _____

16. The right people can participate without adding unnecessary decision makers or unclear responsibility.

☐ Yes ☐ Partly ☐ Not yet

Notes or evidence: _____

5. Willingness and relationship readiness

17. I am willing to examine facts, answer direct questions, and change an assumption when the evidence supports it.

☐ Yes ☐ Partly ☐ Not yet

Notes or evidence: _____

18. I want AI to support people and relationships rather than replace important human judgment.

☐ Yes ☐ Partly ☐ Not yet

Notes or evidence: _____

19. I understand that useful automation requires testing, correction, documentation, and follow-through.

☐ Yes ☐ Partly ☐ Not yet

Notes or evidence: _____

20. I am prepared for honest conversations about fit, limitations, missed commitments, and whether work should pause.

☐ Yes ☐ Partly ☐ Not yet

Notes or evidence: _____

Your working conclusion

Ready for a consultation

All five areas are reasonably present. You can explain the problem, bring usable evidence, maintain stable operations, name an accountable owner, and participate openly in testing and follow-through.

Establish a baseline first

The business is stable and willing, but the current process, evidence, or one-to-three success indicators are not yet clear. Your first useful step is to document what happens now and how improvement will be recognized.

Stabilize before automation

The business is in an active crisis, lacks an accountable owner, cannot safely pause a test, or does not have enough capacity to implement the work. Address those conditions before paying for an automation consultation.

My conclusion: ☐ Ready for a consultation ☐ Establish a baseline first ☐ Stabilize before automation

The business problem I most want to improve:

The one to three indicators I would use:

1.

2.

3.

How I learn best: ☐ Discussion ☐ Demonstration ☐ Written steps ☐ Practice together ☐ Other:

My next action and intended date:

This worksheet is educational and does not provide legal, financial, employment, healthcare, cybersecurity, or other regulated professional advice. Readiness and project fit are determined together on a business-by-business basis.