Summit Labs

LAKELAND · FLORIDA

A FIELD GUIDE

The *7-Question* AI Readiness Checklist

Honest questions to ask before you spend a dollar on AI — written for the small businesses that have to live with the answer.

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WHY THIS CHECKLIST

Most AI projects fail before the first prompt is written.

Not because the technology is bad — the technology is genuinely impressive. They fail because the *business* wasn't ready for it. The data was a mess, the team wasn't bought in, the workflow didn't actually need automation, or no one had defined what success looked like.

This checklist is the conversation I have with every new client in our first call, distilled into something you can do alone with a coffee on a Saturday morning. It will not tell you which model to use or whether to buy ChatGPT Enterprise. It *will* tell you whether your business is ready to get a return on that decision.

> *"The cheapest way to get AI right is to be honest about what you have, what you don't, and what you're actually trying to fix."*

HOW TO USE IT

Walk through the seven questions in order. For each one, mark a checkbox: **1**, **2**, or **3**. At the end you'll tally the totals on the worksheet page and check the band on the scoring page. Plan on about 20 minutes — if a question takes longer than that, you've already learned something useful.

1 What specific outcome are you actually trying to change?

"We want to use AI" is not an outcome. "We want to cut quote turnaround from 4 days to 4 hours" is. The clearer your target, the cheaper the project.

ASK YOURSELF

- Can you state the outcome in one sentence with a number in it?
- Would your team agree this is the most painful problem to solve?
- What happens to the business if you change this metric by 50%?

SCORE YOURSELF — CHECK ONE

- [ ] **1** We just want to "do AI." No specific outcome in mind.
- [ ] **2** We have an area in mind but no specific metric.
- [ ] **3** Specific metric, specific target, written down.

2 Where does the data already live — and is it any good?

AI runs on data the way an engine runs on fuel. If your data is in spreadsheets, sticky notes, and three half-finished CRMs, you don't have an AI problem yet — you have a data problem to solve first.

ASK YOURSELF

- Could you hand a new hire one place to find your customers, jobs, or invoices?
- Is the data updated by people who care about it being right?
- Could you export the last 12 months of it without manual cleanup?

SCORE YOURSELF — CHECK ONE

- [ ] **1** Data is scattered, inconsistent, or unreliable.
- [ ] **2** Mostly in one system, but with rough edges.
- [ ] **3** Clean, centralized, exportable.

3 Who owns this internally — and how much time do they really have?

Every successful AI rollout has an internal champion. Not a steering committee. One person who returns emails and makes decisions. If that person doesn't exist or has no time, the project dies in month two.

ASK YOURSELF

- Can you name the person before you finish reading this sentence?
- Do they have at least 4 hours a week to give to this for the next 90 days?
- Do they have authority to make small decisions without your sign-off?

SCORE YOURSELF — CHECK ONE

- ☐ **1** No one. Or just me, and I have no time.
- ☐ **2** Yes, a name — but they're already slammed.
- ☐ **3** Yes, with the time and authority to lead.

4 What's the cost of *not* changing — in real dollars?

If you can't articulate the cost of the status quo, you can't justify the cost of the fix. Most owners I work with significantly underestimate this. Manual work has a price even when no one writes a check for it.

ASK YOURSELF

- How many hours per week does your team spend on the broken process?
- What's the fully-loaded cost of those hours?
- What does it cost when the process fails — lost deals, redos, late penalties?

SCORE YOURSELF — CHECK ONE

- ☐ **1** I have no idea what it's costing us.
- ☐ **2** I have a rough estimate.
- ☐ **3** I have a defensible number I could put in front of my CFO.

5 How will your team actually *use* this thing day to day?

The graveyard of small business software is full of tools the team refused to use. AI is no exception. If the new workflow requires people to change three habits and learn a new interface, expect resistance. Plan for it.

ASK YOURSELF

- Where does the AI fit into a workflow your team already runs?
- How much retraining does it require? (More than 30 minutes is a lot.)
- What happens on day 90 when the novelty has worn off?

SCORE YOURSELF — CHECK ONE

- [ ] **1** Brand new tool, brand new habits.
- [ ] **2** Fits with some workflow change.
- [ ] **3** Slots cleanly into something the team already does.

6 What's your honest budget — including the second six months?

AI projects rarely fail at launch. They fail in month seven when the budget runs out and no one planned for hosting, refinement, or a second iteration. Plan the full year, not just the build.

ASK YOURSELF

- What's your build budget for the next 90 days?
- What's the monthly run-rate you can sustain (tools, hosting, support)?
- Is there a quarterly check-in budgeted to refine and improve?

SCORE YOURSELF — CHECK ONE

- [ ] **1** No real budget conversation has happened yet.
- [ ] **2** Build budget yes, run-rate plan no.
- [ ] **3** Full-year financial picture — build, run, and improve.

7 What does “done” look like — and how will you know?

If you can't tell me what success looks like before we start, we're going to disagree about whether we got there. Define the finish line in writing on day one. It's the single highest-leverage thing you can do for a project.

ASK YOURSELF

- What's the one number that has to move?
- By when, and by how much?
- What does “we tried it and it didn't work” look like — and is that an acceptable outcome to learn from?

SCORE YOURSELF — CHECK ONE

- [ ] **1** We'll know it when we see it.
- [ ] **2** Rough success criteria.
- [ ] **3** Clear, measurable, time-bound.

TALLY YOUR SCORE

Add it up.

Write the score you marked for each question, then add them. The total falls between **7** (lowest) and **21** (highest). Your number determines which band you're in — and what to do next.

Q1	Specific outcome	_____
Q2	Data quality & location	_____
Q3	Internal owner with time	_____
Q4	Cost of the status quo	_____
Q5	Day-to-day adoption fit	_____
Q6	Honest full-year budget	_____
Q7	Definition of done	_____
Total		_____

WHAT YOUR NUMBER MEANS

Your honest next step.

7–11 STARTING FROM BASE CAMP

Build the foundation first.

You're in good company — most small businesses sit here. Don't spend money on AI yet. Spend it on the foundations: get your data into one place, define one painful problem worth solving, and assign someone to own it. Three months of foundation work will save you a year of failed AI projects.

12–16 ON THE TRAIL

Get a focused diagnostic.

You have most of what you need but two or three soft spots. A focused diagnostic engagement — like our two-week AI Readiness Sprint — will tell you exactly what to fix in what order, and give you a 90-day action plan you can run yourself or with a partner.

17–21 APPROACHING THE SUMMIT

Pick one workflow and pilot.

You've done the hard work. Pick one workflow, define the success metric, set the budget, and execute a tight pilot. If you'd like a second set of eyes on the plan before you commit budget, a Strategy Hour is the right fit.

IF YOU'D LIKE ANOTHER SET OF EYES

Walk through your answers with someone who's done this before.

I read every checklist that comes back — and the conversations that follow are usually the most useful 30–60 minutes of an owner's quarter. Pick the entry point that matches where you are:

Discovery Call	30 minutes · Is there a fit? Talk through your situation, no commitment.	**Free**
Strategy Hour	60 minutes · Walk the checklist together. Leave with a written plan.	**Flat fee**
Sprint	2 weeks · Full diagnostic with stakeholder interviews and a 90-day roadmap.	**Fixed fee**

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