



The AI-Readiness Checklist: Is Your Business Ready for Autonomous Agents?

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Introduction

Is your business architecture strong enough to support the next wave of autonomous technology? Use this diagnostic tool to evaluate your systems, data, and processes.

How to use this checklist:

Review each section and check the box if it applies to your current business state. The more boxes you check, the more "AI-Ready" you are.

Section 1: The Data Foundation

The "fuel" for your AI agents.

Single Source of Truth: All core customer and sales data is centralized in one primary CRM (e.g., Pipedrive or similar). **Data Cleanliness:** We have a process for removing duplicate records and ensuring contact information is up to date. **Documentation:** Core business processes (SOPs) are written down and accessible to the team. **History:** We have at least 6–12 months of clean historical data for the AI to learn from.

Section 2: Complexity & Task Audit

Determining if you need "Rules" or "Reasoning."

The Reasoning Gap: We have tasks that require a human to read an email and decide "what happens next" (Prime candidate for AI). **Unstructured Inputs:** We frequently deal with messy data like voice notes, long PDFs, or varied customer inquiries. **High-Volume Repetition:** We have already

automated our basic "If-This-Then-That" tasks. [] **Goal-Based Tasks:** We have objectives that require multiple steps to complete (e.g., "Research this lead and summarize their recent news").

Section 3: Technical Health

The infrastructure readiness check.

[] **API Connectivity:** Our primary software tools have open APIs or integrate easily with middleware (like Zapier or Make). [] **Minimal Legacy Debt:** Our website and core tools are updated and don't rely on "deprecated" or "end-of-life" technology. [] **Scalable Hosting:** Our digital infrastructure can handle increased API calls and data processing without crashing. [] **Security Protocols:** We have clear rules on who (and what) has access to sensitive company and client data.

Section 4: Team & Culture

The human element of Business Engineering.

[] **Problem-First Mindset:** Our team focuses on solving business problems rather than just buying new software. [] **Agility:** The team is willing to test, fail, and iterate on new autonomous workflows. [] **Expert Guidance:** We have a strategic partner (like WOWSuccessTeam) to ensure tech implementations actually drive ROI.

Scoring Your Readiness

0–4 Boxes: Foundation First. Your priority should be data centralization and SOP documentation. Don't touch AI agents yet. **5–9 Boxes: Hybrid Growth.** You are ready for standard automations and possibly one "pilot" AI agent for a specific task. **10+ Boxes: AI-Accelerated.** Your foundation is solid. You are ready to engineer autonomous agents into your core operations.

Next Steps

If you are tired of the "tech talk" and ready for actual engineering, let's audit your systems together.

[Schedule Your "Get Ready to Grow" Session Here](#)