SELF-ASSESSMENT · 10 MINUTES

Is your business ready for AI?

Check every statement that's true for you today. There are no wrong answers. Gaps simply show where to start. Add up your checks on page 2.

1 Goals & pain points

- [ ] We can name 2–3 tasks that eat the most staff time each week.
- [ ] We know which mistakes or delays cost us the most.
- [ ] We have a specific outcome in mind (time saved, faster quotes, fewer errors).
- [ ] Leadership agrees AI is worth exploring this year.

2 Processes

- [ ] Our key processes are written down, even roughly.
- [ ] We know who owns each step and where handoffs happen.
- [ ] The same work is done the same way by different people.
- [ ] We can point to steps where people re-type the same information.

3 Data & systems

- [ ] Our customer, job, and financial data lives in a few known systems.
- [ ] Those systems can export data or connect to other tools.
- [ ] Our data is reasonably clean (few duplicates, consistent naming).
- [ ] Important documents are in shared, searchable storage, not personal inboxes.

4 People & skills

- [ ] At least one person is curious about AI and willing to champion it.
- [ ] Staff have tried an AI assistant for at least one real task.
- [ ] We can set aside a few hours a month to learn and test.
- [ ] The team sees AI as help, not a threat to their jobs.

5 Security & policy

- [ ] We know what customer and employee data we hold and where it lives.
- [ ] We have, or are willing to write, a simple AI use policy.
- [ ] We use business accounts with admin controls for key tools.
- [ ] We know of any industry rules (e.g., HIPAA, contracts) that limit our data use.

6 Budget & ownership

- [ ] We have a rough monthly budget for software and subscriptions.
- [ ] Someone will own AI tools after setup (accounts, updates, training).
- [ ] We'd measure success with a simple before/after number.
- [ ] We're open to a small pilot before rolling anything out company-wide.

Your score

Count your checks from page 1 (24 possible).

Total checks: _____ **/ 24**

0–8
Laying the groundwork

Start with the basics: write down your top time-wasting tasks, pick one business AI assistant, and try it on one real job. Fix data and process gaps before buying more tools.

9–16
Ready for quick wins

You have enough in place to get value now. Focus on two or three targeted uses, like meeting notes, email drafts, or document Q&A, and measure the time saved.

17–24
Ready to implement

You're positioned for bigger gains: connecting systems, automating handoffs, and building AI into the tools your team uses every day.

Lowest-scoring section? Start there.

Goals or processes

Map one workflow end to end before adding any tool. Clarity beats software.

Data or security

Consolidate where key data lives and set basic account and policy rules first.

People or budget

Name a champion, run a small, low-cost pilot, and share the results with the team.

Red flags to watch for

- ✕ Buying an "AI platform" before you know which problem it solves
- ✕ Sensitive customer or employee data going into personal AI accounts
- ✕ No one responsible for the tool after the initial setup
- ✕ AI output reaching customers without a person reviewing it

Bring this checklist to your consultation.

We'll walk through your answers, map the workflows behind your lowest scores, and leave you with a practical, ranked plan for where AI can help. Virtual, or onsite in CT & western Mass.

Book at mmdsoftware.com/ai

$250
first hour · fee credited toward implementation