

integer7

FREE ASSESSMENT TOOL

AI Automation Readiness Checklist

A practical, 18-point assessment to determine if your business is ready to save time, cut costs, and scale with AI-powered automation.

integer7.co · AI Automation & Lead Generation Consulting

Before You Automate, Assess

Most businesses waste money on AI tools they're not ready for. This checklist helps you identify gaps *before* you invest — so when you do move, you move fast.



Process Readiness

- 1. You can list your top 5 most time-consuming repetitive tasks**
Data entry, report generation, email follow-ups, scheduling, invoice processing — know what eats your hours.
- 2. Your core workflows are documented (even informally)**
If a new hire can follow the process, it can likely be automated. Tribal knowledge is the #1 automation blocker.
- 3. You experience bottlenecks that slow down revenue**
Delayed client onboarding, slow proposal turnaround, or manual approvals that stall deals.
- 4. You spend >5 hours/week on tasks that don't require judgment**
Copy-pasting data between systems, updating spreadsheets, sending routine emails — these are automation wins.



Data & Systems

- 5. You use a CRM (HubSpot, Salesforce, Pipedrive, etc.)**
A CRM is the backbone of most automations. If you're still on spreadsheets, that's your first step.
- 6. Your customer data is centralized (not scattered across tools)**
Contacts in Gmail, notes in Notion, deals in a spreadsheet? Fragmented data makes automation fragile.
- 7. Your tools have APIs or integrate with Zapier/Make/N8N**
Modern SaaS tools can talk to each other. Check if yours support integrations — most do.
- 8. You have a reliable email system (not personal Gmail for business)**
Business email, proper domain, good deliverability. Automated outreach needs a clean foundation.



Team & Culture

- 9. Leadership is open to changing how work gets done**
Automation means rethinking processes. If "we've always done it this way" is the culture, start there first.
- 10. At least one person can own the automation project internally**
Not to build it — but to champion it, test it, and provide feedback. An internal sponsor is critical.
- 11. Your team is comfortable with basic digital tools**
They use cloud apps, manage calendars, and can learn new interfaces. You don't need developers on staff.
- 12. You're willing to invest in training for new workflows**
Even the best automation fails without adoption. Budget 1-2 hours for team onboarding per workflow.



Budget & ROI Mindset

- 13. You can quantify the cost of your current inefficiencies**
 $\text{Hours wasted} \times \text{hourly rate} = \text{money left on the table}$. This number justifies your automation investment.
- 14. You have budget for tools (\$50–\$500/mo) and implementation**
Good automation isn't free, but it pays for itself fast. A \$200/mo tool saving 20 hrs/mo is a no-brainer.
- 15. You think in ROI, not just cost**
The question isn't "how much does it cost?" — it's "how fast does it pay back?" Most automations break even in <3 months.



Growth & Scale

- 16. You've turned away work because you lacked capacity**
If demand exceeds your ability to deliver, automation multiplies your output without multiplying headcount.
- 17. You want to grow revenue without proportionally growing staff**
Scaling from 10 to 50 clients shouldn't require 5× the team. Automation is the leverage.
- 18. You have a clear 12-month growth goal**
Automation works best when it supports a specific target — more leads, faster onboarding, higher retention.

How Did You Do?

Count the items you checked. Your total reveals where you stand.

Score Interpretation

14 – 18

Ready to automate. You have the foundation. The right partner can deliver ROI in weeks, not months. Let's talk.

8 – 13

Almost there. A few gaps to close first. A discovery call can help you prioritize and create a 90-day roadmap.

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Foundation first. Focus on documenting processes and centralizing data. We can help you build the groundwork.

NEXT STEP

Ready to See What's Possible?

Book a free 30-minute discovery call. We'll review your checklist, identify your highest-impact automation opportunity, and map out a clear path forward.

[Book Your Free Discovery Call →](#)

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No Obligation

Honest assessment, zero pressure. If you're not ready, we'll tell you.



Fast ROI

Most clients see payback within 90 days of implementation.



Built for SMBs

Practical solutions sized for your budget and team, not enterprise bloat.