

Small Business AI Readiness Assessment

AxisCoreIT Group LLC

Use this assessment to evaluate your organization's current capacity for AI adoption, automation, and data-driven operations. Rather than a numerical score, use the status indicators to identify where your business is thriving and where there are gaps in your operational foundation.

● Needs Attention	Not started, inconsistent, or high manual friction.
● Building	Active work in progress or partially implemented.
● Optimized	Fully established, documented, and consistently followed.

1. Leadership & Strategy

Defining the "Why" before the "What."

Assessment Area	Description	Status	Notes & Priorities
Goal Definition	We have clear business objectives for using AI and automation.	■ ■ ■	
Risk Awareness	Leadership understands both the opportunities and the security risks of AI.	■ ■ ■	
Strategic Alignment	Our technology investments directly support our 12–24 month business goals.	■ ■ ■	
Operational Roadmap	We have a documented plan for system improvements and modernization.	■ ■ ■	

2. Data Readiness

The quality of your AI is limited by the quality of your data.

Assessment Area	Description	Status	Notes & Priorities
Centralization	Business data (clients, leads, finance) is stored in a central, accessible system.	■ ■ ■	
Data Quality	Our data is clean, standardized, and free of significant duplicates.	■ ■ ■	
Visibility	Key Performance Indicators (KPIs) are tracked and visible via dashboards.	■ ■ ■	
Documentation	Critical business knowledge is recorded in a shared knowledge base (e.g., Notion, Wiki).	■ ■ ■	

3. Operations & Workflows

Automation requires standardized processes to be effective.

Assessment Area	Description	Status	Notes & Priorities
Process Mapping	Core workflows (onboarding, sales, support) are documented step-by-step.	■ ■ ■	
Task Analysis	We have identified high-volume, repetitive manual tasks for automation.	■ ■ ■	
Standardization	Employees follow the same procedures across the organization.	■ ■ ■	
Bottleneck Awareness	We know exactly where work gets stuck or delayed in our current system.	■ ■ ■	

4. Technology & Infrastructure

Modern AI requires a flexible, integrated software stack.

Assessment Area	Description	Status	Notes & Priorities
Integration	Our primary software tools (CRM, Email, Accounting) talk to each other effectively.	■ ■ ■	
Cloud Maturity	We use modern cloud services that offer API access and automation features.	■ ■ ■	
Business Continuity	We have reliable backups and a recovery plan for all critical data.	■ ■ ■	
Asset Management	All software licenses and hardware assets are inventoried and managed.	■ ■ ■	

5. Cybersecurity & Governance

Scaling technology safely requires disciplined protection.

Assessment Area	Description	Status	Notes & Priorities
Staff Training	Employees receive regular training on identifying phishing and social engineering.	■ ■ ■	
Access Control	Permissions are limited to only what each employee needs (Least Privilege).	■ ■ ■	
Data Policy	We have clear rules for how sensitive client and company information is handled.	■ ■ ■	
AI Guidelines	We have established rules for how staff can (and cannot) use public AI tools.	■ ■ ■	

6. AI & Automation Readiness

Moving from experimentation to operational value.

Assessment Area	Description	Status	Notes & Priorities
Use Case Selection	We have identified 2–3 specific "low-risk, high-reward" AI pilot projects.	■ ■ ■	
Culture & Adoption	The team is open to and curious about AI-assisted workflows.	■ ■ ■	
Success Metrics	We know how we will measure the ROI of any new automation (e.g., time saved).	■ ■ ■	
Vendor Evaluation	We have a process for vetting AI vendors for security and compatibility.	■ ■ ■	

Next Steps

Identify the sections with the most ■ indicators. These represent your **Foundational Gaps**. In most cases, cleaning your data and documenting your workflows (**Sections 2 and 3**) must happen before deploying advanced AI solutions.

Completed By: _____ Date: _____