

AI Readiness Checklist

A 22-point self-audit for any small or mid-size business.

Nexus AI Solutions · nexusaiconcepts.com

How to use this

Score yourself honestly on each section. If you check fewer than 5 boxes in a section, that section is your highest-leverage place to add AI right now. The full \$497 AI Readiness Assessment goes deeper, with specific tools, install steps, and an upsell roadmap. But this checklist alone, used honestly, is worth the next 30 minutes of your time.

1. Lead Capture

- We respond to every inbound inquiry within 5 minutes during business hours.
- We have an after-hours system that captures and acknowledges leads automatically.
- Web form, phone, SMS, and social DM all flow into one inbox.
- Every lead gets logged in a CRM with source attribution.
- We can answer 'how many leads did we get last week from each source?' instantly.

2. Lead Follow-up

- Every quoted-but-not-booked lead gets a multi-step follow-up sequence.
- Follow-ups are personalized to the customer (name, business, prior conversation).
- We escalate to a human when the prospect engages or shows buying signals.
- We measure our quote-to-close conversion rate by source.
- We have a re-engagement sequence for leads that went cold 30+ days ago.

3. Reviews and Reputation

- We ask every happy customer for a review automatically (not verbally).
- Review requests go out within 2 hours of job completion or transaction.
- We have a system that follows up if a review request is ignored.
- Negative reviews trigger an internal alert and a recovery process.

- We monitor our reviews across Google, Facebook, and Yelp from one place.

4. Operations and Reporting

- I can see revenue, leads, jobs, and AR on one dashboard without switching apps.
- Reports build themselves on a schedule (daily, weekly, monthly).
- I never spend more than 30 minutes a week on report-building.
- Customer data is connected across CRM, finance, and marketing tools.
- I know my customer acquisition cost and my customer lifetime value.

5. AI in Daily Work

- Repetitive writing tasks (emails, quotes, summaries) use AI assistance.
- We have an internal place to ask 'how do we do X' that searches our docs.
- Customer-facing AI sounds like our brand, not generic.
- We have removed at least 5 hours per week of manual data entry with automation.
- We review AI outputs before they go to customers when stakes are high.

6. Bonus: The Owner's Time

- I spend less than 10 hours per week on tasks I have done a hundred times.
- I am not the bottleneck for daily customer operations.

Where to next

Count your unchecked boxes. Each one is a leak. The average small business we assess has 12-15 unchecked boxes here, and each one represents 1-3 hours per week of recoverable owner time.

If you want a tailored map of your specific leaks with named tools and install steps, the \$97 AI Quick Win Snapshot covers your single highest-leverage fix. The \$497 AI Readiness Assessment covers every leak in your operation.

Both: nexusaiconcepts.com/assessment

100% async. No calls. Refund guarantee on the \$497.