STELLAR
Business Advisors
SOLVING COMPLEX BUSINESS NEEDS

AI for Small Business

A 30-point readiness checklist: where AI can save you time, and what to fix first

Most small and mid-sized businesses don't need a big AI project. They need to find the hours lost to repetitive work and fix the data problems that keep good tools from working. Check every statement that is true for your business today, then use the scoring guide at the end to see where you stand and what to do next.

1. Goals & Opportunities

Know what you want AI to fix before you buy anything.

- ☐ We can name 3 repetitive tasks that eat 5+ hours a week (data entry, follow-ups, reporting, scheduling).
- ☐ We know which customer questions we answer over and over.
- ☐ We have one clear goal AI should support: more revenue, lower cost, or faster service.
- ☐ Leadership has set aside time and a small budget to test AI.
- ☐ We know what an hour of staff time costs, so we can measure savings.
- ☐ We can point to at least one process still run on paper or spreadsheets.

2. Data & Systems

AI is only as good as the data it can reach.

- ☐ Customer data lives in one CRM (Salesforce, HubSpot, etc.), not scattered spreadsheets.
- ☐ Our data is reasonably clean: few duplicates, consistent fields.
- ☐ Our key systems (CRM, accounting, email, POS) can connect to each other.
- ☐ We know where our important documents and files live.
- ☐ We can pull basic KPI reports without hours of manual work.
- ☐ Someone clearly owns our data and systems, in-house or a trusted partner.

3. Quick Wins Within Reach

Practical uses most small businesses can start this quarter.

- [ ] Staff use business AI assistants to draft emails, proposals and summaries.
- [ ] Meeting notes and call summaries are captured automatically.
- [ ] Routine follow-ups (reminders, confirmations, renewals) run on their own.
- [ ] Reports and dashboards refresh automatically.
- [ ] Incoming documents (invoices, forms, applications) are read and filed without retyping.
- [ ] Website and phone inquiries get a fast first response, even after hours.

4. People & Process

Technology sticks when people and processes are ready for it.

- [ ] Key processes are documented well enough that a new hire could follow them.
- [ ] Staff have had basic training on using AI tools well.
- [ ] We have an internal champion who tests new tools and shares what works.
- [ ] Employees understand AI is there to remove busywork, not replace them.
- [ ] We pilot and measure an automation before rolling it out widely.
- [ ] We know which decisions must always have a person in the loop.

5. Guardrails

Protect your customers, your data and your reputation.

- [ ] We have a written policy on what information may go into AI tools.
- [ ] We use business accounts (not free personal ones) for AI that touches company data.
- [ ] We know the privacy rules for our industry (for example HIPAA) and follow them.
- [ ] System access is limited by role and removed promptly when people leave.
- [ ] We have backups and know how to recover if a system fails.
- [ ] A person reviews AI-generated content before it reaches customers.

Scoring Guide

YOUR SCORE: _____ / 30

0 - 10 checked	**Getting started.** Pick one painful, repetitive task and one clean data source. A focused pilot will show value quickly and build confidence.
11 - 20 checked	**Building momentum.** Your foundation is forming. Connect your systems and automate the follow-ups and reports your team still does by hand.
21 - 30 checked	**Ready to scale.** You can move to AI agents that work inside your CRM and workflows, with measurable time and cost savings.

Want a second set of eyes? Book a free 30-minute AI Readiness Review.

Bring your completed checklist. We'll walk through your score, point out the two or three opportunities with the fastest payback, and tell you honestly what is worth doing now and what can wait.

Stellar Business Advisors has helped businesses solve complex problems for more than 20 years, with deep Salesforce, HubSpot and database experience and hands-on AI automation across healthcare, fitness, insurance, legal, publishing and more. For one publisher, our team consolidated eight databases into a single CRM and replaced an offshore editing and formatting operation with AI automation.