

CHECKLIST

# AI readiness for established SMBs.

Five areas. Thirty questions. An honest starting point for the conversation about where your company actually stands — and where the leverage really is.

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## How to use this

This isn't a test. It isn't an "AI maturity score" you can frame for the board. It's a tool for an honest internal conversation — with the owner, key staff, and whoever will own AI in practice. Mark each question YES, PARTIAL or NO. When you finish, check the scoring rubric on the last page.

Time required: 20 minutes solo, 60 minutes with a team of three.

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01 · AREA

## Systems & infrastructure

Do you have a stable, understandable technical foundation to make AI rollout sensible at all?

- We know which three systems hold the most decision-critical data (customers, orders, finance).
- Our core systems are actively maintained and updated — not stuck on a five-year-old version.
- We have a clear policy on who can export data from our systems and in what format.
- Our email, documentation and access run on modern cloud infrastructure (M365, Google Workspace or equivalent).
- We know which processes today require manual data copying between systems.
- The last security update on our core system happened in the past 12 months.

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02 · AREA

## Processes & automation

Which processes drain the team — and can we even describe them?

- We can describe in writing the five main processes in the company — from first customer contact to invoice issuance.
- We know how many hours per week key employees spend on routine work (reports, proposals, documentation).
- At least one process in the company has been partially automated in the past two years with a measurable outcome.

Our processes work the same way even when a key employee is on leave.

We don't rely on a single Excel file that "only she/he knows how it works."

We have documented rules on when a process requires manual human review and when it doesn't.

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03 · AREA

## People & knowledge

Does the team actually know how — and dare to — use AI in everyday work?

At least half of the team has used an AI tool (ChatGPT, Claude, Copilot or similar) for a real work task in the past year.

We have at least one employee who could lead an internal AI practice if the role were created.

Leadership and the team hold a realistic understanding of what AI can and cannot do — without hype, without cynical refusal.

We have a structured way for the team to share AI best practices (a channel, a meeting, a doc).

Employees know that AI tool usage isn't "secret" or "punishable" — the policy is clear and open.

In the past year we ran at least one structured training session for AI use — not just a one-off talk.

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04 · AREA

## Data & security

Are the constraints any serious AI project requires clearly defined and enforced?

We have a documented rule on which data must never go to an external AI tool (personal data, client data, contractual data).

When using public AI tools, we know whether "training opt-out" or no-retention mode is enabled.

We have NDAs and basic AI-use clauses with vendors and contractors.

- In line with GDPR we have clearly defined who is responsible for personal data oversight when AI is used.
- We have a plan for what to do if an employee accidentally sends sensitive data into an AI tool.
- In the past 12 months we have audited access permissions to our core systems.

05 · AREA

## Strategic direction

Does leadership have a realistic plan or just an aspiration?

- The owner or leadership can explain in two minutes why we're investing in AI — without "because it's a trend."
- We have a budget agreed for AI and automation for the next 12 months.
- We understand that AI rollout requires months of adaptation and learning — we don't expect "switch on and it works."
- We have one accountable owner for the AI program — a person with both responsibility and authority to decide.
- We are willing to experiment at small scale before rolling out company-wide.
- We have a clear definition of "success" — measurable outcomes, not just a feeling.

### Scoring

Each YES = 1 point. PARTIAL = 0.5. NO = 0. 30 questions total. Result:

**0–10** — It isn't AI time yet. Start with foundations: document processes, modernise core systems. **Foundations**

**11–18** — Solid starting point. Begin with one process automation while training the team in parallel. **Ready**

**19–24** — Strong profile. Systems modernisation, automation and monthly training cycles can run in parallel. **Acceleration**

**25-30** — Mature operation. Focus on measuring ROI and scaling practices across the company.

**Maturity**

## Next step

If the result raises more questions than answers, a 30-minute discovery call without sales is available. Walk us through your situation — we'll tell you whether and where we can help. If the engagement doesn't make sense, we'll say so directly.

**Book a 30-min discovery call — [smartilabs.si](https://smartilabs.si) →**