

The small business guide to AI - Checklist

Your complete roadmap to implementing AI in your business

Use this checklist to systematically integrate AI into your small business operations, from initial assessment to full implementation.

Self-assessment and planning

- ☐ 1. List your top 5 most time-consuming repetitive tasks
 - ☐ 2. Identify which processes are most prone to human error
 - ☐ 3. Document your biggest operational bottlenecks
 - ☐ 4. Inventory the data you currently collect (customer lists, sales history, website traffic, etc.)
 - ☐ 5. Assess how your data is stored (CRM, spreadsheets, scattered across systems)
 - ☐ 6. List all software and platforms you currently use (your "technology stack")
 - ☐ 7. Check existing software for built-in AI features you're not using
 - ☐ 8. Define one specific, measurable goal for your first AI project
 - ☐ 9. Set a timeline for your first 30-day AI pilot
 - ☐ 10. Establish baseline metrics to measure improvement against
-

Debunking myths and mindset

- ☐ 11. Accept that AI tools are now accessible to businesses of any size
- ☐ 12. Research free and low-cost AI tools relevant to your business
- ☐ 13. Understand that AI augments employees rather than replacing them
- ☐ 14. Recognize that most AI tools require no technical expertise to implement

- ☐ 15. Commit to starting small rather than transforming everything at once
 - ☐ 16. Identify one team member to champion AI adoption (even if it's just you)
-

Customer service AI

- ☐ 17. List your 10 most frequently asked customer questions
 - ☐ 18. Write clear, helpful answers to each FAQ
 - ☐ 19. Research chatbot options (Tidio, Freshdesk, Zendesk, Intercom)
 - ☐ 20. Sign up for a free trial of your chosen chatbot platform
 - ☐ 21. Configure chatbot with your FAQs and common responses
 - ☐ 22. Set up human handoff for questions the bot can't answer
 - ☐ 23. Install chatbot on your website
 - ☐ 24. Test chatbot thoroughly before going live
 - ☐ 25. Monitor chatbot performance for first 2 weeks
 - ☐ 26. Refine responses based on actual customer interactions
 - ☐ 27. Track time saved and customer satisfaction scores
 - ☐ 28. Expand chatbot capabilities based on new common questions
-

Marketing and content AI

- ☐ 29. Choose a primary AI writing assistant (ChatGPT, Claude, Jasper, or Copy.ai)
- ☐ 30. Learn to write effective prompts with role, task, context, and format
- ☐ 31. Create a template library of prompts for common content needs
- ☐ 32. Set up AI-assisted content repurposing workflow (blog to social, email, video)
- ☐ 33. Research social media scheduling tools with AI features (Buffer, Hootsuite, Predis.ai)
- ☐ 34. Implement social media scheduling and automation
- ☐ 35. Set up AI-powered email marketing platform (Constant Contact, Mailchimp, ActiveCampaign)

- ☐ 36. Create automated welcome email sequence for new subscribers
 - ☐ 37. Set up personalized email campaigns based on customer behavior
 - ☐ 38. Implement abandoned cart recovery emails (if applicable)
 - ☐ 39. Configure AI-driven customer segmentation
 - ☐ 40. Track marketing metrics: engagement rates, conversion rates, CAC, LTV
-

Operations and administration AI

- ☐ 41. Evaluate AI scheduling assistants for appointment and meeting booking
 - ☐ 42. Implement automated scheduling on your website or booking system
 - ☐ 43. Set up AI meeting transcription and summarization tool
 - ☐ 44. Create standard operating procedures using AI documentation assistance
 - ☐ 45. Implement AI-powered data entry automation where possible
 - ☐ 46. Set up workflow automation tools (Zapier, Make) to connect systems
 - ☐ 47. Identify manual data transfers between systems and automate them
 - ☐ 48. Document AI-enhanced workflows for team training
-

Inventory management AI (for product-based businesses)

- ☐ 49. Assess current inventory tracking methods and pain points
 - ☐ 50. Research AI inventory tools compatible with your sales platform
 - ☐ 51. Enable built-in AI features in existing platforms (Shopify Magic, Adobe Sensei)
 - ☐ 52. Set up demand forecasting based on historical sales data
 - ☐ 53. Configure automated reorder alerts or automatic reordering
 - ☐ 54. Implement multi-channel inventory synchronization (if selling on multiple platforms)
 - ☐ 55. Set up dynamic pricing rules for slow-moving inventory
 - ☐ 56. Track inventory accuracy and stockout reduction
-

Financial management AI

- ☐ 57. Research AI accounting tools (Sage, QuickBooks with AI features, ReInvestWealth, Otto AI)
 - ☐ 58. Connect AI bookkeeping to bank accounts and payment systems
 - ☐ 59. Set up automatic transaction categorization
 - ☐ 60. Review and train AI on your specific expense categories
 - ☐ 61. Implement automated invoicing for completed work or orders
 - ☐ 62. Set up automatic payment reminders for overdue invoices
 - ☐ 63. Configure cash flow alerts and forecasting
 - ☐ 64. Set up real-time financial dashboards
 - ☐ 65. Schedule regular review of AI-generated financial insights
 - ☐ 66. Track time saved on bookkeeping and improvement in payment collection
-

Measuring results

- ☐ 67. Track Customer Acquisition Cost (CAC) before and after AI implementation
- ☐ 68. Monitor conversion rates across marketing channels
- ☐ 69. Measure Customer Lifetime Value (LTV) changes
- ☐ 70. Track First Response Time for customer inquiries
- ☐ 71. Monitor chatbot resolution rate (issues solved without human help)
- ☐ 72. Measure customer satisfaction scores
- ☐ 73. Calculate time saved per task after AI implementation
- ☐ 74. Track error rate reduction in automated processes
- ☐ 75. Monitor direct cost savings monthly
- ☐ 76. Track invoice processing time improvements
- ☐ 77. Create a monthly AI performance review dashboard
- ☐ 78. Document ROI for each AI tool implemented

Ethics and compliance

- ☐ 79. Clearly disclose when customers are interacting with AI (chatbots, etc.)
 - ☐ 80. Review data privacy requirements (GDPR, DMA) relevant to your business
 - ☐ 81. Update cookie consent banners to comply with current regulations
 - ☐ 82. Ensure customer data collected by AI tools is stored securely
 - ☐ 83. Create clear privacy policy explaining AI and data usage
 - ☐ 84. Implement process for customers to access or delete their data
 - ☐ 85. Regularly audit AI outputs for potential bias
 - ☐ 86. Maintain human oversight for important AI-driven decisions
 - ☐ 87. Document your ethical AI practices as part of your brand
-

Team adaptation and training

- ☐ 88. Communicate AI implementation plans to your team
 - ☐ 89. Address employee concerns about AI and job security
 - ☐ 90. Identify tasks to shift from routine work to higher-value activities
 - ☐ 91. Train team members on AI tools relevant to their roles
 - ☐ 92. Develop guidelines for when to use AI vs. human judgment
 - ☐ 93. Create feedback loop for team to report AI issues or improvements
 - ☐ 94. Invest in developing human skills AI can't replace (creativity, empathy, strategy)
 - ☐ 95. Celebrate time saved and redirect it to meaningful work
-

Ongoing optimization

- ☐ 96. Review AI tool performance monthly
- ☐ 97. Stay current with new AI capabilities and tools quarterly

- ☐ 98. Refine prompts and AI configurations based on results
 - ☐ 99. Expand AI implementation to next priority area after each success
 - ☐ 100. Share AI wins and learnings with your team regularly
-

Your AI implementation score: Complete all 100 items to fully integrate AI into your small business operations. Review this checklist quarterly to identify new opportunities and ensure continuous improvement.

Remember: Start with one area, prove the value, then expand. Small consistent progress beats ambitious plans that never get implemented.