

AI Readiness Checklist for Small and Mid-Sized Businesses (SMB)

A quick guide by Datumsurge

Introduction

Artificial Intelligence (AI) is transforming how small and mid-sized businesses (SMBs) operate — from streamlining workflows to reducing costs and enhancing customer experiences.

But before investing in AI, it's essential to ask: Is your business ready?

This 10-minute checklist helps you assess your readiness across five key areas: Leadership, Data, Technology, People, and Compliance.

The AI Readiness Checklist

1. Leadership & Strategy

- Leadership supports digital transformation.
- Business goals include measurable AI use cases.
- Clear priority areas are identified for AI pilots.

2. Data & Infrastructure

- Data is digitized, structured, and accessible.
- Secure systems exist for storage and protection.
- KPIs and metrics are tracked consistently.

3. Technology & Tools

- Core systems are modern and cloud-ready.
- Automation tools are already in use.
- Openness to piloting AI-powered solutions.

4. People & Skills

- Team is receptive to adopting new technologies.
- Training and workshops are available to upskill staff.
- An “AI champion” is identified internally.

5. Compliance & Risk Management

- Privacy regulations (GDPR, HIPAA, etc.) are understood.
- Policies exist for responsible technology adoption.
- AI outputs will be monitored for fairness and accuracy.

Scoring Your Readiness

- 12–15 checks: 🚀 High Readiness – You’re ready to begin piloting AI solutions.
- 8–11 checks: ⚖️ Moderate Readiness – Strengthen data and leadership alignment first.
- 0–7 checks: 🛠️ Low Readiness – Focus on foundational improvements before adopting AI.

Next Steps with Datumsurge

At Datumsurge, we don’t just deliver tools — we act as your AI consulting partner.

Our team helps SMBs move from readiness to results through:

- AI Consulting & Advisory – Assess your current environment, identify high-value use cases, and guide you through every stage of AI adoption.
- AI Training & Workshops – Build internal capability and confidence with hands-on learning.
- Custom AI Solutions – From chatbots to analytics platforms, tailored to your business needs.
- Data & Project Management – Ensure your data is secure, well-organized, and projects deliver measurable business.

⚡ With Datumsurge by your side, your business can unlock efficiency, reduce costs, and thrive in the AI era.

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