

Nova Buzz.

MARKETING



THE AI READINESS CHECKLIST

A plain worksheet for business owners weighing their first AI pilot.

HOW TO USE THIS

This isn't a scorecard. There's no passing grade, and checking "no" on a few of these doesn't mean AI is off the table for your business.

What it is: a plain way to see where your business already has what a system needs to work, and where it doesn't yet.

Work through the four sections in order — Data, Process, People, Tools. Check off what's already true today, not what you plan to fix eventually. Be honest about the gaps. A pilot built against real, imperfect conditions surfaces the same problems either way, so there's no advantage to a rosier picture here.

When you're done, use the worksheet later in this document to pick one narrow piece of work to start with. Bring the whole picture, clean parts and messy parts, to a discovery call. That's exactly what the conversation is for.

— Anthony, Nova Buzz Marketing

THE CHECKLIST – DATA & PROCESS

Data

- ☐ Customer contact details are current and correct
Why it matters: Automated follow-up only works if it can actually reach the right person.
- ☐ Every open quote or job has a status that reflects reality
Why it matters: A system watching for stalled work needs an accurate signal to act on.
- ☐ Records for this piece of work live in one clear place
Why it matters: A system has to know where to look for the truth, not guess between tools.
- ☐ The same kind of record gets entered the same way every time
Why it matters: Inconsistent entries make patterns hard for any system to detect.
- ☐ There's a named person responsible for keeping this data current
Why it matters: Without an owner, records drift out of date quietly, one field at a time.
- ☐ Old, closed-out records are separated from active ones
Why it matters: Most systems only need to act on what's live today, not the full history.

Process

- ☐ The workflow you want to fix repeats often enough to matter
Why it matters: A system built for something that happens rarely won't earn its place.
- ☐ The steps of the process are mostly clear, even if unwritten
Why it matters: A system needs rules to follow, even simple, informal ones.
- ☐ You can point to the exact moment work falls through
Why it matters: That moment is the trigger a system will watch for.
- ☐ The process is currently handled by one team, not several
Why it matters: Fewer people involved means fewer opinions on what "done" means.
- ☐ The rules don't change dramatically case by case
Why it matters: A process with no consistent pattern underneath is hard to build on.
- ☐ You've picked one narrow piece of work to start with
Why it matters: A narrow pilot is easier to build well and judge honestly.

THE CHECKLIST – PEOPLE & TOOLS

People

- ☐ Someone on the team can describe how the work is actually done today
Why it matters: That plain description is what a first system gets built against.
- ☐ There's a person ready to review the system's output before it goes out
Why it matters: Every system worth installing keeps a human approval step in the loop.
- ☐ The team is open to a new step being added to a tool they already use
Why it matters: Resistance to any change slows down even a carefully built system.
- ☐ Someone is available to answer questions while the pilot runs
Why it matters: A pilot needs a point of contact so small issues get caught early.
- ☐ Leadership is prepared to judge the pilot on real output
Why it matters: An honest verdict, not a projection, is what makes the next step easy.

Tools

- ☐ You know which calendar, CRM, invoicing, or messaging tool holds the records
Why it matters: Systems get built on top of what a business already uses, not a new platform.
- ☐ The tool in use is one the team actually keeps current
Why it matters: A tool nobody updates isn't a system of record, whatever it's called.
- ☐ You can access or export the data inside that tool
Why it matters: A system has to be able to read from somewhere specific.
- ☐ There's no plan to replace this tool in the near future
Why it matters: Building on top of software that's about to change adds needless risk.
- ☐ You know who has admin access to make changes if needed
Why it matters: Getting a pilot started sometimes takes one small settings change.

PICK YOUR FIRST PILOT

Five prompts to work through once the checklist is done. Answer in your own words — there's no ideal answer, only an honest one.

1. What's one piece of work that repeats every week and causes visible pain?

2. What's the exact moment it currently falls through the cracks?

3. Where do the records for this work live today, and are they kept current?

4. What would “done” look like if a system caught it instead of a person?

5. Who on your team would review the output before it goes out?

WHAT TO DO NEXT

Once you've worked through the checklist and the worksheet, the next step is a conversation, not a form. A discovery call is a working session about where time is going in your business, what's currently falling through, and which single piece of it is worth building first.

[Book a discovery call](#)

<https://calendar.app.google/QMA7W1VR1XBAJUX8>

[Or email the team](#)

team@novabuzzmarketing.com

Bring the whole picture — what's clean, what's messy, and what you filled in on the worksheet. That's exactly what the call is for.