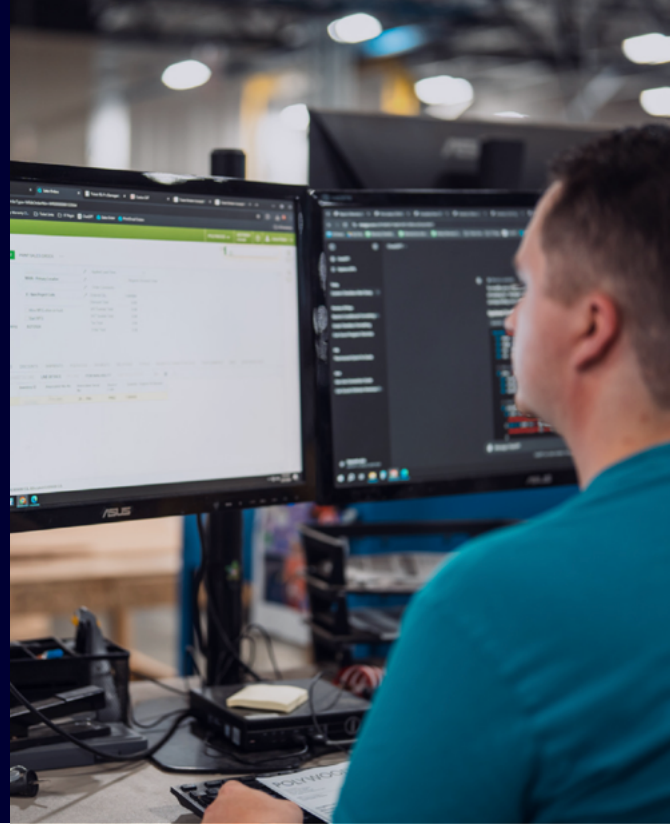


AI Readiness Evaluation Checklist



Is Your Business AI-Ready?

Artificial Intelligence (AI) is no longer a far-off concept designed exclusively for multinational corporations—it's a transformative tool that can enable small and medium-sized businesses (SMBs) to work smarter, increase productivity, and make more informed data-driven decisions. To unlock AI's full potential, it is essential to understand whether your current systems and processes are prepared to support it.

The following checklist is designed to help you assess your organization's readiness in five key areas: Data Integration, Automation, User Adoption, Scalability, and Security. Your responses to these questions will provide you with greater insight into your current position and identify areas for growth, allowing you to leverage AI-driven opportunities fully.

Whether you're just beginning your digital transformation or aiming to modernize your ERP solution or accounting systems, this checklist is your initial step toward creating an intelligent, more agile business.



Data Integration



Automation



User Adoption



Scalability



Security

AI Assessment Checklist



Data Integration

YES

NO

Is your data centralized and easily accessible?

☐☐

Do you have data governance policies in place?

☐☐

Are you collecting the right data to support AI use cases?

☐☐

Automation

YES

NO

Have you identified and documented workflows that could benefit from AI?

☐☐

Have you implemented any basic automation tools?

☐☐

Is there a plan to scale automation across your departments?

☐☐

Is your current system capable of integrating AI tools?

☐☐

User Adoption

YES

NO

Is your organization open to innovation and experimentation?

☐☐

Is there excitement and awareness on the benefits of AI?

☐☐

Are employees trained to work with AI-enhanced tools?

☐☐

Is there a strategy to manage resistance to AI adoption?

☐☐

Scalability

YES

NO

Is your current IT infrastructure scalable and cloud-ready?

☐☐

Are APIs and data pipelines available for AI tools?

☐☐

Can your systems integrate new AI capabilities quickly?

☐☐

Can your current system handle increased data loads?

☐☐

Security

YES

NO

Are there modern security protocols in place?

☐☐

Do you have documented approaches for managing data privacy and security?

☐☐

Is there transparency in how AI decisions are made?

☐☐

What if You Answered “No” to Most Questions?”

That’s okay. This checklist is designed to help you evaluate your current situation and make informed decisions about your next steps.

If your answers indicate gaps in data integration, automation, or scalability, it’s a sign that your current systems may be holding you back from fully realizing the benefits of AI, and it might be time to upgrade your technology.

Here’s what you can do next:

1. **Begin with Small Steps:** Identify one or two high-impact areas (such as invoicing or reporting) where automation or AI could save time and minimize errors.
2. **Evaluate Your Current Systems:** Determine whether your existing accounting or ERP tools are flexible and modern enough to support AI capabilities.
3. **Explore Smarter Solutions:** Consider AI-ready platforms like Acumatica’s Cloud ERP, which is designed for SMBs and features embedded intelligence, real-time insights, and adaptive scalability.
4. **Engage Your Team:** Discuss with your staff the pain points and opportunities—AI adoption is most successful when it’s a collective effort.

AI is no longer just for large enterprises. With the right approach, it can function as a powerful tool to help your business grow more intelligently, rapidly, and efficiently.

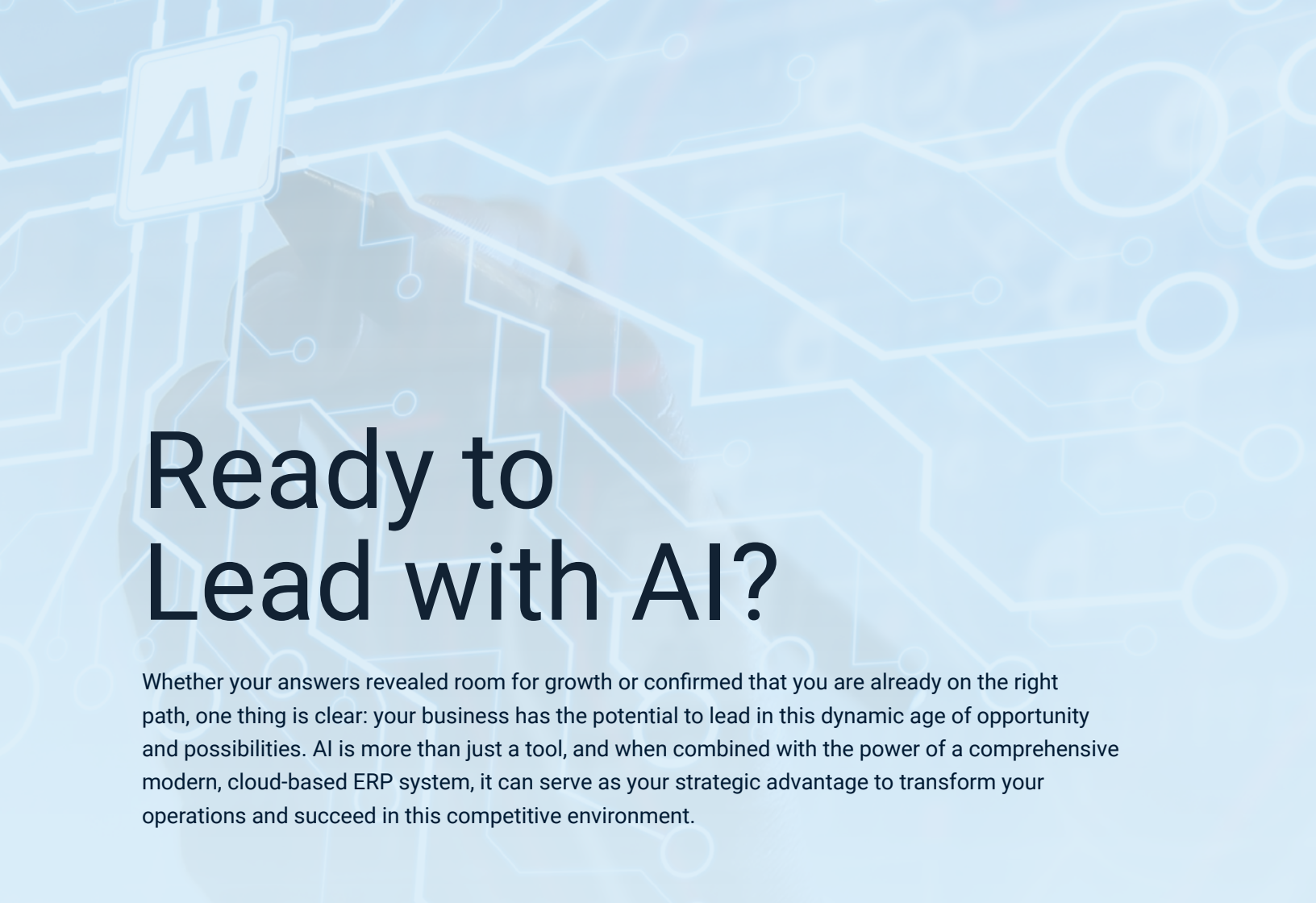
What if You Answered “Yes” to Most Questions?

That’s excellent news—your business is already well-positioned to leverage AI! With strong foundations in data integration, automation, scalability, and security, you are ready to move from exploration to execution.

Here’s what you can do next:

- **Accelerate Innovation:** To gain a competitive edge, begin piloting AI-driven tools in areas like forecasting, customer engagement, or anomaly detection.
- **Improve Integration:** Seek AI-first platforms like Acumatica’s Cloud ERP solution, which directly integrates intelligence into your workflows, facilitating smarter decisions and quicker execution.
- **Strategically Scale:** Expand your AI initiative across departments to foster efficiency, consistency, and growth.
- **Celebrate Wins:** Share your success stories internally and externally and serve as a model for how SMBs can thrive in the era of intelligent business.

You’ve laid the groundwork; now it’s time to unleash AI’s full potential.



Ready to Lead with AI?

Whether your answers revealed room for growth or confirmed that you are already on the right path, one thing is clear: your business has the potential to lead in this dynamic age of opportunity and possibilities. AI is more than just a tool, and when combined with the power of a comprehensive modern, cloud-based ERP system, it can serve as your strategic advantage to transform your operations and succeed in this competitive environment.

Download our solution brief and explore how Acumatica's AI-first ERP platform can elevate your business to the next level of efficiency and competitiveness.



At Strategies Group, we believe AI delivers the greatest value when it's built on a strong operational foundation. As a leading Acumatica Gold Certified Partner and back-to-back Acumatica Construction Partner of the Year, we help construction, manufacturing, distribution, and field service companies modernize their operations with connected, cloud-based ERP solutions that eliminate data silos and provide the accurate, real-time information AI depends on. From technology assessments and ERP implementations to process optimization and long-term client success, our team partners with organizations to build systems that not only improve efficiency today but also prepare them for the next generation of AI-driven innovation. Whether you're just beginning your digital transformation or looking to maximize the value of your existing technology, Strategies Group is here to help you build a smarter, more connected business.

