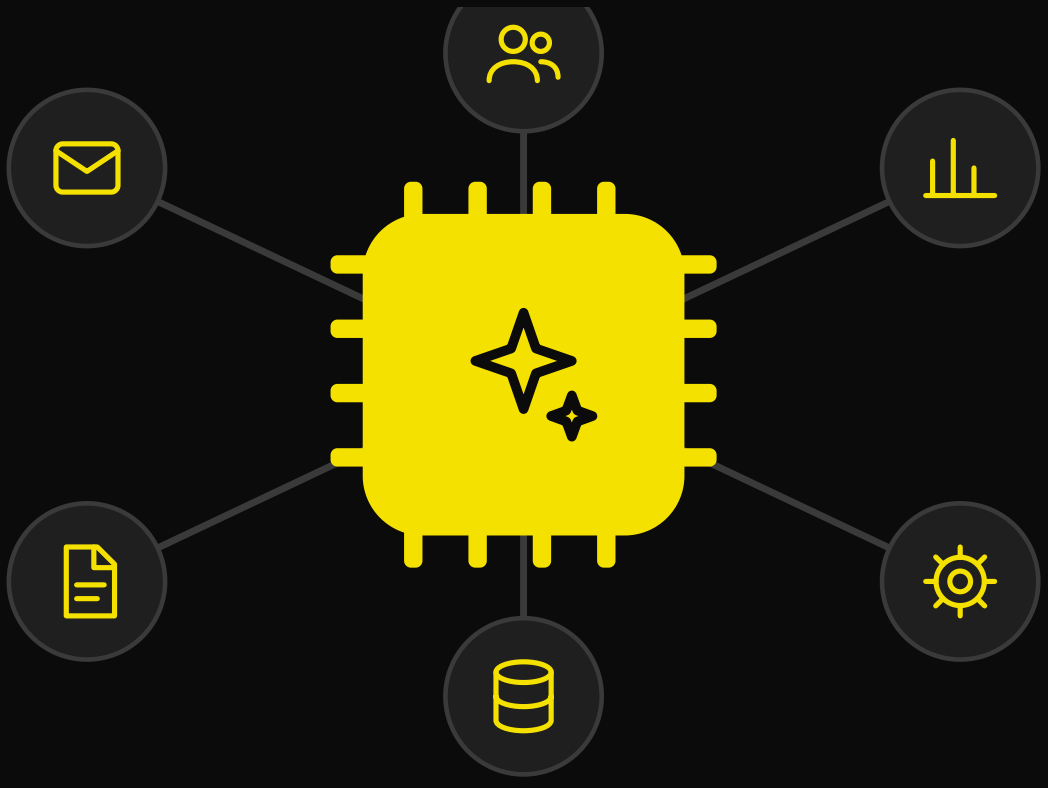
FREE ASSESSMENT

ASSESSMENT · FOUR STEPS · 90-DAY PILOT

# AI IN OPERATIONS READINESS CHECK

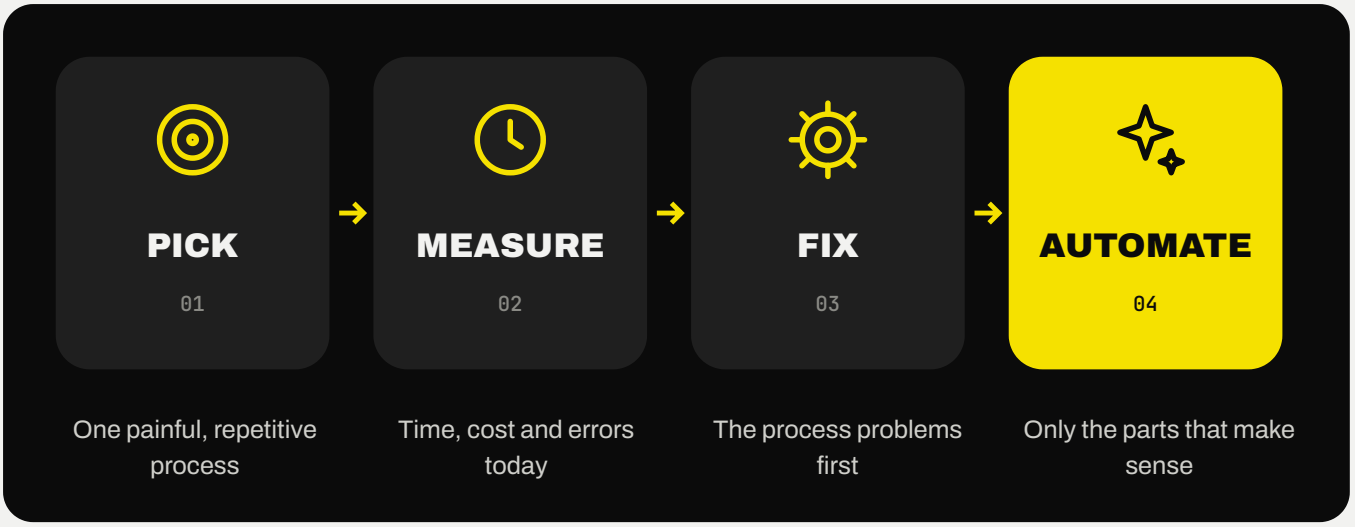
Find where AI can genuinely save time in your business, and whether your data, processes and people are ready for it.



START WITH THE PROCESS

# AI WON'T FIX A BROKEN PROCESS.

The businesses getting real value didn't start with a tool. They followed four moves, in this order.




THIS CHECK · FOUR STEPS

STEP 1
**Process inventory**

STEP 2
**Prioritise**

STEP 3
**Readiness score**

STEP 4
**90-day pilot**

Ask each team lead for the three tasks that are most repetitive or frustrating, then work through the steps together.

USE CASES

# WHERE AI EARNS ITS KEEP



In service businesses, these six come up most.

### Enquiry handling

Triage and draft replies to inbound enquiries; route to the right person.

### Quotes & proposals

Draft first versions from templates and call notes.

### Admin & data entry

Extract details from emails, PDFs and forms into your CRM or ERP.

### Reporting

Summarise weekly numbers and flag anomalies for managers.

### Customer service

Answer common questions from your own knowledge base, with human handover.

### Content

First drafts of case studies, emails and social posts for human editing.

Notice the pattern: AI drafts, extracts or summarises. A person checks and decides.

STEP 1 · PROCESS INVENTORY

# LIST THE WORK THAT EATS YOUR WEEK



Repetitive, rules-based and high-volume tasks are the candidates.

| | HRS / WK | RULES? | IMPACT | EFFORT |
|---|---|---|---|---|
| TASK 1 | | Y N | 1 2 3 4 5 | 1 2 3 4 5 |
| TASK 2 | | Y N | 1 2 3 4 5 | 1 2 3 4 5 |
| TASK 3 | | Y N | 1 2 3 4 5 | 1 2 3 4 5 |
| TASK 4 | | Y N | 1 2 3 4 5 | 1 2 3 4 5 |
| TASK 5 | | Y N | 1 2 3 4 5 | 1 2 3 4 5 |
| TASK 6 | | Y N | 1 2 3 4 5 | 1 2 3 4 5 |
| TASK 7 | | Y N | 1 2 3 4 5 | 1 2 3 4 5 |
| TASK 8 | | Y N | 1 2 3 4 5 | 1 2 3 4 5 |

STEP 2 · PRIORITISE

# IMPACT VS EFFORT

Plot each task from your inventory. Start top-left.

IMPACT ↑

HIGH IMPACT · LOW EFFORT

## START HERE

Your first pilot.

HIGH IMPACT · HIGH EFFORT

## PLAN FOR LATER

Needs process or data work first.

LOW IMPACT · LOW EFFORT

## QUICK WINS

Fine for individuals to try.

LOW IMPACT · HIGH EFFORT

## IGNORE

Not worth it yet.

EFFORT →

STEP 3 · READINESS SCORE

# ARE YOU READY?



Score 0 (no), 1 (partly), 2 (yes). Total out of 20.

| | | |
|---|---|---|
| 01 · DATA | We know where our key information lives (CRM, spreadsheets, inboxes) and it is reasonably clean. | 0 1 2 |
| 02 · DATA | Customer and staff data is handled under UK GDPR, and we know which tools can and can't be given personal data. | 0 1 2 |
| 03 · PROCESS | Our core processes are written down, even roughly, with a named owner for each. | 0 1 2 |
| 04 · PROCESS | We know which tasks are repetitive, rules-based and high-volume. | 0 1 2 |
| 05 · PEOPLE | Leaders are willing to give a pilot time and a clear sponsor. | 0 1 2 |
| 06 · PEOPLE | Staff have been told why we're exploring AI and how it affects their roles. | 0 1 2 |
| 07 · TOOLS | We have business accounts (not personal logins) for any AI tools in use. | 0 1 2 |
| 08 · GOVERNANCE | We have a simple AI use policy: what's allowed, what isn't, who signs off. | 0 1 2 |
| 09 · MEASUREMENT | We can measure the time or cost of a process today, so we can see if it improves. | 0 1 2 |
| 10 · BUDGET | We have a small budget and a 90-day window to test one use case properly. | 0 1 2 |

YOUR RESULT

# ADD UP YOUR SCORE




TOTAL

_____ / 20

**0–8**

**Fix foundations first**
Data, process owners, a use policy.

**9–15**

**Ready for one pilot**
Tightly scoped, one process.

**16–20**

**Pilot and plan a roadmap**
Test, then plan what comes next.

LOWEST SCORES FIRST

Any 0s on data, process owners or a use policy? Those are the foundations to fix before you pilot.

STEP 4 · 90-DAY PILOT

# PROVE IT ON ONE PROCESS

Twelve weeks. One process. A clear before and after.



### WEEKS 1–2

Pick one process. Map it step by step. Measure the time, cost and error rate today.

### WEEKS 3–4

Fix the obvious process problems first. Decide which steps AI should do and where a human checks.

### WEEKS 5–8

Build and test with a small group. Keep personal data out unless the tool and contract allow it.

### WEEKS 9–12

Measure again. Keep, change or stop. Write down what you learned for the next process.

## YOUR PILOT

**PROCESS WE WILL PILOT**

**PILOT OWNER**

**BASELINE (TIME / COST)**

**TARGET AT DAY 90**

General guidance only. Check data protection obligations and supplier terms before putting personal or confidential data into any AI tool.

NEXT STEP

# WANT A SECOND PAIR OF EYES?

Send us your inventory and score. On a free call we'll help you pick the right first pilot, and be honest if the foundations need work first.

BOOK A FREE 30-MIN CALL
**wearenv.co.uk/contact**

EMAIL US
**info@wearenv.co.uk**

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