

**FREE TASKSAVVY FIELD GUIDE**

# **The Small Business AI Readiness Guide**

Prepare your workflows, information and operating controls before  
adding AI.

**ONE SYSTEM. MANY DOORS.**

**A practical guide for small-business owners who want clarity before  
complexity.**

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# AI should strengthen the system—not become another layer of confusion.

The current trend is to place an AI interface on everything and call it innovation. Real implementation begins underneath the interface: with clear work, reliable information, defined permissions and human accountability.

**AI accelerates whatever already exists. If the workflow is clear, it creates leverage. If the workflow is chaotic, it scales confusion.**

## The five foundations

- Clients: one reliable view of relationships, status and next actions.
- Tasks: clear ownership, priority, due dates and completion rules.
- Revenue: visibility into invoices, payments, balances and follow-up.
- Assets: known location, condition, assignment and maintenance status.
- Operations: repeatable processes, exceptions and handoffs.

# 1. Map the work before automating it

Choose one repeated process that consumes time or creates errors. Write the process as it actually happens—not as you wish it happened.

## Use this five-line workflow map

- Trigger: What starts the process?
- Input: What information is required?
- Decision: Where is judgment needed?
- Action: What should happen next?
- Record: Where is the outcome stored?

## Good first candidates

- Turning form submissions into structured records.
- Creating routine summaries from known data.
- Drafting follow-up messages for human approval.
- Flagging overdue work, missing information or exceptions.

## Poor first candidates

- A process no one can explain consistently.
- High-stakes decisions without human review.
- Work that depends on incomplete or unreliable data.
- Automation that writes over source records without a recovery path.

## 2. Score your readiness

Score each statement from 0 to 4. Use evidence, not optimism.

| Score | Meaning          | Action                                                                   |
|-------|------------------|--------------------------------------------------------------------------|
| 0     | Undefined        | No consistent process or source of truth exists.                         |
| 1     | Scattered        | The work happens, but knowledge lives across messages, memory and files. |
| 2     | Documented       | The steps are understood, but execution is still inconsistent.           |
| 3     | Controlled       | Inputs, ownership, permissions and exceptions are defined.               |
| 4     | Automation-ready | The process is stable, testable, measurable and reversible.              |

### Readiness statements

- We know which record is authoritative.
- Required fields and naming rules are defined.
- Each step has an owner.
- Exceptions have a clear route.
- AI cannot publish, pay, delete or overwrite without the intended approval.
- We can test the automation with safe sample data.
- We can audit what happened and reverse a bad outcome.

### Interpretation

0–10: establish the workflow. 11–18: standardize the data. 19–23: test a controlled pilot. 24–28: ready for measured automation.

### 3. Install guardrails before intelligence

- Least access: give the system only the information and actions required.
- Human approval: require review for financial, legal, personnel or destructive actions.
- Source protection: preserve formulas, schemas and original records.
- Audit trail: record inputs, outputs, approvals, errors and changes.
- Exception queue: route uncertainty to a person instead of forcing a guess.
- Sandbox first: test on a clone before touching live operations.

**A trustworthy AI system knows when to act, when to ask and when to stop.**

#### The TaskSavvy principle

CORE remains the operating record. Flows capture and organize work. AI assists within explicit boundaries. The interface may change; the underlying business logic remains owned and understandable.

## 4. Your 30-day readiness plan

### **Week 1: Choose**

Select one repeated workflow and define its desired outcome.

### **Week 2: Structure**

Create the fields, statuses, ownership rules and source of truth.

### **Week 3: Control**

Define permissions, approvals, exception handling and the audit trail.

### **Week 4: Pilot**

Test with sample records, measure results and decide whether to expand.

### **Pilot success measures**

- Minutes saved per transaction.
- Fewer missing fields or handoff errors.
- Faster response or follow-up time.
- Percentage of outputs approved without revision.
- Number and type of exceptions.

# Your first automation canvas

**Process to improve:**

**Current trigger:**

**Required information:**

**Human decision points:**

**Safe AI assistance:**

**Actions requiring approval:**

**System of record:**

**How success will be measured:**

# Choose the right next step

- Use a guide when you need clarity and can implement the process yourself.
- Use BusinessCORE and Flows when you need a structured operating foundation in Google Workspace.
- Use a custom build when the workflow is unique to your business.
- Use CORE Care when you want continuing maintenance, improvements and support.
- Use AI implementation only after the workflow, permissions and success measures are clear.

**Build the system first. Add intelligence second. Scale only what you can trust.**

**Explore free resources and TaskSavvy systems at [tasksavvycore.com](https://tasksavvycore.com)**

Educational material only. This guide does not provide legal, accounting, cybersecurity or compliance advice.