

# AI Automation Readiness Checklist

A practical checklist for SMEs, women entrepreneurs, retailers, food businesses and startups planning AI chatbot or workflow automation.

## Use Cases to Identify

- Repeated customer questions that staff answer every day.
- Website or WhatsApp inquiries that need qualification before owner follow-up.
- Customer follow-up reminders after quotation, order, delivery or consultation.
- Document drafting support for proposals, SOPs, replies and internal notes.
- Dashboard summaries for leads, sales, orders, stock or pending work.

## Data and Process Readiness

- List common questions and approved answers.
- Define what AI can answer and what must go to a human.
- Collect product, service, pricing, policy and contact details in one place.
- Create escalation rules for sensitive, legal, finance or complaint matters.
- Decide where automation should work: website, WhatsApp, form, CRM or internal dashboard.

## Safety and Review

- Avoid promising guaranteed results from AI automation.
- Review AI responses before using them in sensitive business areas.
- Protect customer data and avoid unnecessary personal information collection.
- Train staff to monitor automation and correct wrong or outdated answers.
- Start small, measure usefulness and improve the flow step by step.

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