

# AI Readiness Scorecard

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## Diagnose Your Business in 5 Minutes

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### Instructions

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For each question, circle the number that best describes your current situation. Be honest—this diagnostic only works if you're truthful about where you are today.

Add up your scores at the end to get your AI Readiness Level and recommended starting point.

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### Section 1: Lead Generation & Sales (25 points max)

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#### Q1: How do you currently generate leads?

Score	Answer
1	Referrals only / waiting for business
3	Basic outreach (cold calls, manual emails)
5	Some digital marketing (ads, content)
7	Multi-channel marketing with tracking
10	Integrated system with automated lead gen

Your Score: \_\_\_\_

#### Q2: How do you qualify leads before sales calls?

Score	Answer
1	No qualification—anyone can book
3	Basic form on website
5	Manual review before approving calls
7	Scoring system in CRM
10	Automated qualification + routing

Your Score: \_\_

### Q3: What's your average time to follow up with new leads?

Score	Answer
1	More than 24 hours (or inconsistent)
3	Same day
5	Within 2 hours
7	Within 30 minutes
10	Instant automated response + human follow-up

Your Score: \_\_

Section 1 Total: \_\_ / 25

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## Section 2: Sales Process & Closing (25 points max)

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### Q4: How standardized is your sales process?

Score	Answer
1	Every deal is different
3	General framework, but varies by rep
5	Documented process, loosely followed
7	Documented and trained process
10	Documented, trained, and tracked in CRM

Your Score: \_\_

**Q5: How do you create proposals/quotes?**

Score	Answer
1	From scratch each time
3	Copy and modify old proposals
5	Templates in Word/Google Docs
7	Proposal software with templates
10	Automated proposal generation from CRM data

**Your Score:** \_\_

**Q6: How do you handle pricing?**

Score	Answer
1	Make it up each time
3	Standard rate card
5	Tiered pricing with options
7	Value-based pricing with ROI justification
10	Dynamic pricing optimized by data

**Your Score:** \_\_

**Section 2 Total:** \_\_ / 25

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## Section 3: Client Delivery & Retention (25 points max)

### Q7: How do you onboard new clients?

Score	Answer
1	Ad hoc, varies every time
3	Basic checklist
5	Documented process with templates
7	Automated onboarding with milestones
10	Fully systematized with client portal

Your Score: \_\_

### Q8: How do you track client health/satisfaction?

Score	Answer
1	We don't, until they complain or leave
3	Occasional check-in calls
5	Regular reviews, manually tracked
7	Health score in CRM
10	Automated health monitoring with alerts

Your Score: \_\_

### Q9: What's your annual client retention rate?

Score	Answer
1	<60% (high churn)
3	60-70%
5	70-80%
7	80-90%
10	90%+

Your Score: \_\_

Section 3 Total: \_\_ / 25

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## Section 4: Technology & Operations (25 points max)

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### Q10: What CRM do you use?

Score	Answer
1	None / spreadsheets only
3	Basic CRM (rarely used)
5	CRM actively used for contacts
7	CRM with pipeline + basic automation
10	Integrated CRM with full automation

Your Score: \_\_

### Q11: How automated is your email communication?

Score	Answer
1	All manual
3	Basic autoresponders
5	Some drip campaigns
7	Behavior-triggered sequences
10	AI-powered personalization at scale

Your Score: \_\_

### Q12: How do you currently use AI in your business?

Score	Answer
1	Not at all
3	ChatGPT for occasional tasks
5	AI tools for content or research
7	AI integrated into 1-2 workflows
10	AI embedded across multiple operations

Your Score: \_\_

Section 4 Total: \_\_\_ / 25

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## Calculate Your Total Score

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Section	Your Score
Section 1: Lead Generation & Sales	___ / 25
Section 2: Sales Process & Closing	___ / 25
Section 3: Client Delivery & Retention	___ / 25
Section 4: Technology & Operations	___ / 25
<b>TOTAL</b>	<b>___ / 100</b>

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## Your AI Readiness Level

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### Level 1: Foundation (Score 1-40)

**Where You Are:**

Your business runs on hustle and manual effort. You've built something valuable, but you're the bottleneck. Growth requires your time.

**Your Risk:**

You're one illness or vacation away from revenue dropping. Competitors with better systems will eventually outpace you.

**Your Opportunity:**

Massive. Even basic automation can 2-3x your efficiency. You're starting from scratch, which means clean implementation.

**Recommended Starting Point:**

→ **System #2: Automated Lead Qualification**

Why: Before you automate outreach, you need to ensure you're talking to the right people. Stop wasting time on unqualified calls.

**Quick Win This Week:**

Create a simple intake form that asks 3 qualifying questions before anyone can book a call. Track how many unqualified leads it filters out.

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### Level 2: Growth (Score 41-70)

**Where You Are:**

You have systems, but they're not connected. There are manual handoffs that create delays and errors. You know what "should" happen but it doesn't always.

**Your Risk:**

Inconsistency. Good months and bad months with no clear pattern. Team members doing things differently.

**Your Opportunity:**

Integration. Connecting your existing tools with AI can eliminate 80% of manual work and create predictable growth.

**Recommended Starting Point:**

→ **System #1: AI Sales Outreach** OR **System #3: AI Proposals**

Why: You have the foundation. Now it's about acceleration. Automate either the top of funnel (outreach) or the bottom (proposals) based on your biggest bottleneck.

**Quick Win This Week:**

If outreach: Set up a 3-email sequence in your CRM for new leads.

If proposals: Create a proposal template with 5 modular sections you can mix/match.

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**Level 3: Scale (Score 71-100)****Where You Are:**

Your systems work. Growth is more about optimization than building. You're looking for marginal gains and new revenue streams.

**Your Risk:**

Complacency. What got you here won't get you to the next level. Competitors are catching up.

**Your Opportunity:**

Advanced AI deployment. Predictive models, dynamic pricing, expansion revenue from existing clients.

**Recommended Starting Point:**

→ **System #4: Pricing Optimization** OR **System #5: Retention AI**

Why: You're already good at getting clients. Now maximize the value of each one through better pricing and reduced churn.

**Quick Win This Week:**

If pricing: Analyze your last 10 deals—what was the range? What correlated with higher prices?

If retention: Calculate your actual churn rate and customer lifetime value.

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**Section-by-Section Analysis****Your Weakest Section = Your Highest-Impact Opportunity**

Look at which section you scored lowest. That's where AI will have the biggest impact.

Lowest Section	Recommended Focus
Lead Generation & Sales	Systems #1 & #2
Sales Process & Closing	Systems #3 & #4
Client Delivery & Retention	System #5
Technology & Operations	System #6 + infrastructure

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## Your Personalized Action Plan

Based on your score, here's your 30-day action plan:

### Week 1: Audit

- Complete this scorecard (done!)
- Identify your #1 bottleneck
- Map your current process for that area

### Week 2: Research

- Review the relevant system in the Blueprint
- Evaluate recommended tools
- Draft implementation plan

### Week 3: Build

- Set up primary tool
- Create first automation/template
- Test with real data

### Week 4: Launch

- Go live with new system
- Track baseline metrics
- Identify next optimization

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## Ready for Expert Guidance?

Your AI Readiness Score tells you WHERE to focus. But implementation is where results happen.

### Book a Free 30-Minute Strategy Session

In this call, we'll:

- ✓ Review your scorecard results
- ✓ Identify quick wins for your specific situation
- ✓ Create a customized implementation roadmap
- ✓ Discuss done-for-you options (if interested)

**Book now: [heyrodney.ai/book](https://heyrodney.ai/book)**

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