SMALL BUSINESSES · CHECKLIST

Agent readiness checklist

Answer each question before you sign up to any AI agent. Score 2 for yes, 1 for partly, 0 for no.

Area	Question	Score
Purpose	We can name the single job we want the agent to do.	
Purpose	That job happens at least weekly and takes real time.	
Purpose	We know roughly how many hours a month it takes today.	
Process	The job follows the same steps most of the time.	
Process	The steps, answers or rules are written down somewhere.	
Process	We can easily check whether it was done right.	
Risk	A wrong answer once would be embarrassing, not costly.	
Risk	Customers can always reach a person quickly.	
Risk	We know what customer data it will see.	
Supplier	We know where our data is stored and processed.	
Supplier	The supplier will sign a data processing agreement.	
Supplier	We know the cost at three times today’s usage, and how to leave.	

What your total means

Total	Suggested next step
18 to 24	Ready to trial. Run one job for a month and measure hours saved against time spent fixing mistakes.
10 to 17	Close. Tidy the process or the supplier questions first, then trial.
0 to 9	Not yet. Start with AI features in tools you already pay for, or write the process down.

UK note: if the agent records calls or reads messages, check what you need to tell people under UK GDPR. The ICO publishes guidance on AI and data protection.

Want a second pair of eyes?

I can look at your business and tell you which kind of agent, if any, is worth trying. Email alex@revarc.ai or visit revarc.ai/contact.