7-Point AI Readiness Checklist

For Service Business Owners

> Is your business ready for AI? Use this checklist to identify the gaps costing you leads, revenue, and growth. Score yourself honestly — then see how AI can fill those gaps.

☐ 1. Call Response Audit

The Test: Track every incoming call for one full week. How many ring more than 3 times? How many go to voicemail?

Why It Matters: 80% of callers who reach voicemail will hang up and call a competitor instead. If more than 10% of your calls go unanswered, an AI voice agent is your single highest-ROI investment.

Action Item: Log your missed calls this week. Multiply by your average job value. That number is what you're leaving on the table every single month.

> *AI Fix: An AI voice agent answers every call instantly — 24/7, nights, weekends, holidays. No missed calls, ever.*

☐ 2. Lead Follow-Up Speed Test

The Test: Have a friend submit a lead form on your website. Start a timer. How long until someone from your team responds?

Why It Matters: Studies show that responding within 5 minutes makes you 21x more likely to qualify a lead compared to waiting 30 minutes. After one hour, the lead has likely already called someone else.

Action Item: Time your actual response. If it's over 5 minutes, you have a speed problem.

> *AI Fix: AI chat and SMS agents respond to new leads in under 5 seconds — qualifying them, answering questions, and booking appointments while your team focuses on the job at hand.*

☐ 3. After-Hours Coverage Check

The Test: Call your own business at 8 PM on a Tuesday. What happens? Call again on Saturday morning. What happens?

Why It Matters: 40% of service calls come outside of business hours. If those callers hit a voicemail or a generic answering service, they'll move on.

Action Item: Document exactly what happens when someone reaches out after hours. Voicemail? Generic message? Nothing?

> **AI Fix:** AI doesn't clock out. It handles inquiries, books appointments, and sends confirmations around the clock — so you wake up to new bookings, not missed opportunities.

☐ 4. Booking Friction Score

The Test: Pretend you're a brand-new customer. Try to book an appointment with your own business using only your website or phone. Count every step.

Why It Matters: Every additional step in your booking process loses approximately 20% of potential customers. If it takes more than 2-3 steps, you're bleeding leads.

Action Item: Count the steps from first contact to confirmed appointment. Is it more than 3?

> *AI Fix: AI captures the lead, qualifies them, checks your calendar, books the appointment, and sends a confirmation — all in one seamless conversation. One step for the customer.*

☐ 5. Follow-Up Sequence Inventory

The Test: List every automated follow-up sequence you currently have. Include: no-show reminders, post-estimate follow-ups, review requests, and reactivation campaigns for past customers.

Why It Matters: The fortune is in the follow-up. If you're relying on memory or sticky notes, you're guaranteed to lose 30-50% of leads that just needed one more touchpoint.

Action Item: Write down your sequences. If you have fewer than 3 active automations, there's money being left behind.

> *AI Fix: AI-powered CRM handles automated SMS, email, and voicemail follow-ups — nurturing every lead on autopilot so nothing falls through the cracks.*

☐ 6. Review Generation Pipeline

The Test: After your last 10 completed jobs, how many customers received an automated review request? How many left a Google review?

Why It Matters: Businesses with 4.5+ stars on Google get 28% more clicks than those below 4.0. Reviews are the #1 local SEO factor, and most service businesses leave this to chance.

Action Item: Check your Google review count and rating. If you're under 50 reviews or below 4.5 stars, you have a review pipeline problem.

> *AI Fix: Automated review requests go out after every completed job — via text or email. AI even handles the timing and follow-up to maximize response rates.*

☐ 7. Data & CRM Readiness

The Test: Can you answer these questions in under 60 seconds: How many leads came in last month? What's your close rate? Which marketing channel drives the most revenue?

Why It Matters: AI is only as powerful as the data it works with. If your leads live in spreadsheets, text threads, sticky notes, and memory — AI can't help you until you centralize.

Action Item: Identify where your customer data currently lives. If it's in more than 2 places, consolidation is priority #1.

AI Fix: A unified CRM puts all leads, conversations, appointments, and pipeline data in one place — giving AI the foundation it needs to actually work for your business.

How Did You Score?

0-2 checks: You're losing significant revenue. AI can transform your business overnight.

3-4 checks: You've got a good foundation, but AI can plug the gaps fast.

5-7 checks: You're ahead of most — AI will take you from good to dominant.

Ready to see what AI can do for YOUR business?

Book a free demo at **mtnpeaksolutions.com** or call **(801) 814-0954**