

FIELD WORKSHEET · 10-15 MIN WITH YOUR TEAM

The AI Fit Checklist

Find the one workflow worth automating —
and the ones you should fix by hand first.

WHO THIS IS FOR

Owner-led service businesses doing **\$1M–\$10M a year**. Founders, operators, ops leads, agency owners, and consultants who suspect AI could help — but want to know *where*, and what to fix first.

HOW TO USE IT

Print it, or fill it in on screen. Pick **one workflow**, work through the seven checks with your team, and tally an AI Fit Score. Then bring it to a review.

BEFORE YOU START

Most AI projects fail because they automate the wrong thing.

Not because the tools are bad — because the workflow underneath was messy, undocumented, or risky to begin with. Automating a broken process just makes the mess move faster. This worksheet helps you separate the workflow that's actually ready from the ones that need a human fix first.

01

Pick one workflow

Not your whole business.
One repeatable task.

02

Run the seven checks

Tick honestly. Gaps are the point.

03

Score & decide

Fix first, targeted fit, or strong fit.

THE WORKFLOW YOU'RE SCORING

Name the one workflow you'll evaluate...

01 Pick the workflow

A good candidate is boring, frequent, and well-defined. Tick the ones that are true today.

- This task happens every week.

- It costs owner or team time.

- It has a clear trigger — something kicks it off.

- It has a clear output — you know what "done" produces.

- The team knows what "good" looks like.

- Mistakes are recoverable.

02 Check repeatability

Ask the honest question: **Could a trained admin complete this without asking the owner?**

3 Documented and consistent – same every time, written down.

2 Mostly repeatable, but tribal – lives in someone's head.

1 Different every time – depends on judgment in the moment.

CIRCLE ONE – YOUR REPEATABILITY SCORE

3

Documented
& consistent

2

Mostly repeatable,
but tribal

1

Different
every time

03 Find the real bottleneck

Where does this workflow actually get stuck? Be specific — the type of bottleneck decides whether AI helps at all.

HUMAN BOTTLENECK → CLARIFY OWNERSHIP FIRST

Owner judgment, approvals, delegation, unclear responsibility. AI won't fix who's allowed to decide.

PROCESS BOTTLENECK → FIX BEFORE AUTOMATING

Messy handoffs, unclear SOPs, duplicated work, inconsistent edge cases. Automate this and you scale the mess.

TECH BOTTLENECK → STRONG AI CANDIDATE

Manual entry, copy/paste, formatting, routing and status updates. This is the boring, repetitive work AI is built for.

THE REAL BOTTLENECK HERE IS...

Name it plainly — human, process, or tech.

04 Risk check

The more of these you tick, the more human review you need before AI touches it.

- Does this touch customers directly?

- Does it affect pricing, legal, money, medical, or tax advice?

- Could a bad output damage trust?

- Is there a human review gate in place?

- Can we roll it back quickly?

05 Data and examples

AI needs something to learn from and a way to know it got it right. Tick what's true.

- We have 10+ examples of good outputs.

- We know where the source information lives.

- Inputs are not scattered across five different tools.

- Someone can explain the decision rules.

- We know the success metric.

06 AI Fit Score

Score each line 1–3. Total it up, then read the band below.

Repeatability	<input type="text"/>
Bottleneck type (tech = 3, process = 2, human = 1)	<input type="text"/>
Volume 3 = 10+ hrs/wk · 2 = 4–9 hrs/wk · 1 = 1–3 hrs/wk	<input type="text"/>
Risk 3 = internal / low-risk · 2 = customer-facing with review · 1 = money / legal / brand-sensitive or no review gate	<input type="text"/>
Business value 3 = clear revenue / margin / time impact · 2 = useful but not urgent · 1 = nice-to-have	<input type="text"/>
TOTAL · OUT OF 15 —	

5–8

Fix first

Not ready. The workflow needs human cleanup before any tool.

9–12

Targeted fit

Promising. Automate one step, with a human in the loop.

13–15

Strong fit

Build it. Define the spec and run a pilot.

07 What to do next

FIX
FIRST

Map the workflow end to end, remove ambiguity, and assign clear ownership.
Come back and re-score once it's documented.

TARGETED

Pick one step, add a human review gate, and run a two-week pilot. Measure against the success metric before you expand.

STRONG

Define the full spec – trigger, inputs, rules, output, review gate, and success metric – then build and ship the pilot.

OUR DECISION & FIRST MOVE

Write the one thing you'll do this week...

Owner / who's accountable...

NEXT STEP

Want a second set of eyes on your workflow?

Take the live AI Fit Assessment at jonstenstrom.com, then bring this checklist to an AI Fit Review.

START HERE

Take the AI Fit Assessment

jonstenstrom.com/#scan



THEN BOOK

Book an AI Fit Review

cal.com/jon-stenstrom-ai/ai-consultation



Bring your completed checklist to the AI Fit Review. We'll use it to pick the first workflow, define the review gate, and decide whether AI is worth deploying.