

The Small Business AI Rollout Checklist

Tick each box as you go. Four steps, twelve weeks, no big software bills.

Step 1: Audit your workflows and find the bottlenecks

- ☐ List every day-to-day admin and operations task in your business.
- ☐ Mark the repetitive, high-frequency, manual ones that eat your team’s time.
- ☐ Spot the usual time sinks: generic customer replies, email sequences, data entry, scheduling.
- ☐ Pick ONE success metric (for example: cut weekly scheduling time by 50%, or onboarding from 3 days to 1).
- ☐ Write down today’s baseline number so you can prove the improvement.

Step 2: Choose low-cost, single-use tools

Stick to off-the-shelf tools that plug into what you already use. Avoid enterprise suites and custom builds. Prices are indicative; always check the current price.

Department	Task	Example tools	Typical cost / month
Customer support	FAQs and routing tickets	Moneypenny, Zendesk AI	Free trials to ~£20/user
Marketing	Posts, blogs, newsletters	ChatGPT Plus, Claude Pro	~£16 (\$20)
Operations / admin	Meeting notes and action items	Otter.ai, Microsoft Copilot	Free basic to ~£25/user

- ☐ Pick one task and one tool to start (not five).
- ☐ Check the tool’s data and privacy terms before anyone uses it.
- ☐ Confirm it connects to the systems you already use.

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Step 3: Roll out in three phases over 12 weeks

Weeks 1-4	Pilot	1-2 tech-comfortable people test the tool. Keep feedback focused on usability and bottlenecks.
Weeks 5-8	Train and set rules	Write a one-page internal AI usage policy. Train the wider team on writing good prompts.
Weeks 9-12	Full rollout	Extend to the whole department and track your baseline metric closely.

- ☐ Pilot owners chosen and told what "good" looks like.
- ☐ Week 4 review held: what worked, what did not.
- ☐ One-page usage policy written and shared.
- ☐ Team trained on prompts and on the rules below.
- ☐ Week 12 result measured against the baseline from Step 1.

Step 4: Set governance and safety boundaries

- ☐ Protect proprietary data. Never paste sensitive client financials, intellectual property or staff personal data into public AI tools such as the free version of ChatGPT.
- ☐ Keep a human in the loop. Every piece of AI text, code or analysis is reviewed and verified by an employee before it reaches a client or supplier.
- ☐ Check UK GDPR. Make sure any customer-facing tool meets UK GDPR, including how third-party AI providers store and process user data. See the ICO's guidance on AI and data protection.

My success metric

Metric: _____

Baseline: _____ Target: _____ Result (week 12): _____

Want more plain-English AI help for your business? Visit aiboom.uk or email hello@aiboom.uk.