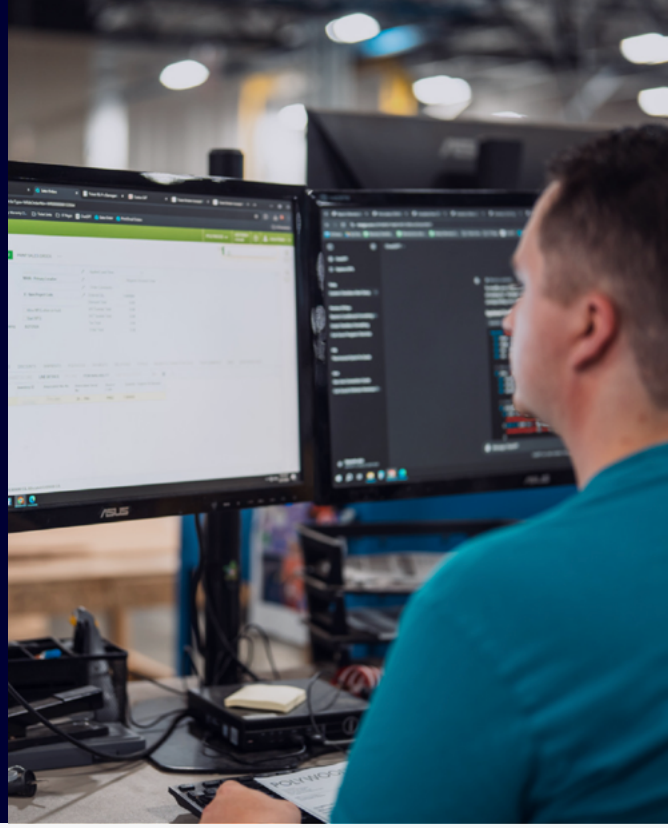
Acumatica
The Cloud ERP

AI Readiness Evaluation Checklist



Is Your Business AI-Ready?

Artificial Intelligence (AI) is no longer a far-off concept designed exclusively for multinational corporations—it's a transformative tool that can enable small and medium-sized businesses (SMBs) to work smarter, increase productivity, and make more informed data-driven decisions. To unlock AI's full potential, it is essential to understand whether your current systems and processes are prepared to support it.

The following checklist is designed to help you assess your organization's readiness in five key areas: Data Integration, Automation, User Adoption, Scalability, and Security. Your responses to these questions will provide you with greater insight into your current position and identify areas for growth, allowing you to leverage AI-driven opportunities fully.

Whether you're just beginning your digital transformation or aiming to modernize your ERP solution or accounting systems, this checklist is your initial step toward creating an intelligent, more agile business.

Data Integration | **Automation** | **User Adoption** | **Scalability** | **Security**

AI Assessment Checklist

Data Integration	YES	NO
Is your data centralized and easily accessible?	☐	☐
Do you have data governance policies in place?	☐	☐
Are you collecting the right data to support AI use cases?	☐	☐

Automation	YES	NO
Have you identified and documented workflows that could benefit from AI?	☐	☐
Have you implemented any basic automation tools?	☐	☐
Is there a plan to scale automation across your departments?	☐	☐
Is your current system capable of integrating AI tools?	☐	☐

User Adoption	YES	NO
Is your organization open to innovation and experimentation?	☐	☐
Is there excitement and awareness on the benefits of AI?	☐	☐
Are employees trained to work with AI-enhanced tools?	☐	☐
Is there a strategy to manage resistance to AI adoption?	☐	☐

Scalability	YES	NO
Is your current IT infrastructure scalable and cloud-ready?	☐	☐
Are APIs and data pipelines available for AI tools?	☐	☐
Can your systems integrate new AI capabilities quickly?	☐	☐
Can your current system handle increased data loads?	☐	☐

Security	YES	NO
Are there modern security protocols in place?	☐	☐
Do you have documented approaches for managing data privacy and security?	☐	☐
Is there transparency in how AI decisions are made?	☐	☐

What if You Answered “No” to Most Questions?

That’s okay. This checklist is designed to help you evaluate your current situation and make informed decisions about your next steps.

If your answers indicate gaps in data integration, automation, or scalability, it’s a sign that your current systems may be holding you back from fully realizing the benefits of AI, and it might be time to upgrade your technology.

Here’s what you can do next:

1. Begin with Small Steps: Identify one or two high-impact areas (such as invoicing or reporting) where automation or AI could save time and minimize errors.
2. Evaluate Your Current Systems: Determine whether your existing accounting or ERP tools are flexible and modern enough to support AI capabilities.
3. Explore Smarter Solutions: Consider AI-ready platforms like Acumatica’s Cloud ERP, which is designed for SMBs and features embedded intelligence, real-time insights, and adaptive scalability.
4. Engage Your Team: Discuss with your staff the pain points and opportunities—AI adoption is most successful when it’s a collective effort.

AI is no longer just for large enterprises. With the right approach, it can function as a powerful tool to help your business grow more intelligently, rapidly, and efficiently.

What if You Answered “Yes” to Most Questions?

That’s excellent news—your business is already well-positioned to leverage AI! With strong foundations in data integration, automation, scalability, and security, you are ready to move from exploration to execution.

Here’s what you can do next:

- Accelerate Innovation: To gain a competitive edge, begin piloting AI-driven tools in areas like forecasting, customer engagement, or anomaly detection.
- Improve Integration: Seek AI-first platforms like Acumatica’s Cloud ERP solution, which directly integrates intelligence into your workflows, facilitating smarter decisions and quicker execution.
- Strategically Scale: Expand your AI initiative across departments to foster efficiency, consistency, and growth.
- Celebrate Wins: Share your success stories internally and externally and serve as a model for how SMBs can thrive in the era of intelligent business.

You’ve laid the groundwork; now it’s time to unleash AI’s full potential.

Ready to Lead with AI?

Whether your answers revealed room for growth or confirmed that you are already on the right path, one thing is clear: your business has the potential to lead in this dynamic age of opportunity and possibilities. AI is more than just a tool, and when combined with the power of a comprehensive modern, cloud-based ERP system, it can serve as your strategic advantage to transform your operations and succeed in this competitive environment.

Download our solution brief and explore how Acumatica's AI-first ERP platform can elevate your business to the next level of efficiency and competitiveness.

Acumatica Cloud ERP is a comprehensive business management solution that was born in the cloud and built for more connected, collaborative ways of working. Designed explicitly to enable small and mid-market companies to thrive in today's digital economy, Acumatica's flexible solution, customer-friendly business practices, and industry-specific functionality help growing businesses adapt to fast-moving markets and take control of their future.

For more information on Acumatica, visit www.acumatica.com or follow us on LinkedIn.

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