AI & Analytics Readiness Checklist

A quick self-assessment from EA Analytics Consulting on where your business exposed and where is the fastest opportunity?

Work through the four sections below. Check off what's already true for your business today. The unchecked items are where the money, time, and missed revenue usually are.

1. Data & Analytics Foundations

☐ We can see revenue, cost, and margin by product, customer, or channel, not just a total.

☐ Our numbers live in one place, not scattered across spreadsheets, POS, CRM, and email exports.

☐ Someone could pull last month's performance in minutes, not days.

☐ We trust our reports enough to decide from them without double-checking in a spreadsheet first.

2. Strategy & Decision-Making

☐ We know which products, customers, or channels actually drive our profit, not just our revenue.

☐ We have a clear view of what’s driving change month to month, not just that a number moved.

☐ Leadership reviews the same numbers on a set cadence, not ad hoc.

☐ We have a documented plan for where the business is investing next, tied to data, not just gut feel.

3. AI Readiness

☐ We've identified at least one repetitive, time-consuming task that AI could reasonably take off someone's plate.

☐ Our data is clean and structured enough to actually feed an AI tool or workflow.

☐ Someone on the team owns "what AI should we be using" as an actual question, not a someday idea.

☐ We understand the difference between AI that saves time and AI that drives revenue, and we know which one we need first.

4. Technology & Automation

☐ Repetitive reporting, alerts, or data entry are automated, not done by hand every week.

☐ We'd know within a day, not a month, if something unusual happened (a refund spike, a cost spike, a drop-off).

☐ Our tools talk to each other, so data isn't re-entered in more than one place.

☐ We have a plan to maintain and update these systems, not just a one-time build that nobody owns after launch.

What your answers mean

Mostly checked: you have a solid foundation. The highest-value next step is usually AI and automation, turning existing systems into ones that act, not just report.

A few unchecked in each section: there's no single fix. A short strategy and analytics engagement to prioritize the gaps will save more than jumping straight to a tool.

Mostly unchecked: start with data and analytics foundations first. Strategy, AI, and automation all get harder and more expensive to do well without that in place.

Next step

This checklist tells you *where* the gaps are. A 30-minute discovery call is the fastest way to find out *what to do about them*, and what it would take to fix the ones costing you the most.

Book a 30-min discovery call → eaanalyticsconsulting.com