OTTO365 AI BRIEF - FREE CHECKLIST

Is your business AI-ready?

Ten quick yes/no checks for UK small businesses. Tick every one that is true today. It takes five minutes, and it tells you where AI would actually save you time - and what to sort out first.

1 Time

- [ ] We can name three tasks we repeat every week.
  Copying data, chasing replies, answering the same questions.
- [ ] We know roughly how many hours a week they take.
  A rough guess is fine. It is how you measure payback.

2 Tools & data

- [ ] Our key information lives in tools we already use.
  Microsoft 365, Google Workspace or a CRM - not only in people's heads.
- [ ] We know who can see which files.
  AI assistants can surface anything a person has access to.
- [ ] We know which Microsoft 365 or Google plan we are on.
  New AI features are often plan-dependent.

3 Safety

- [ ] We have a simple rule for what staff may paste into AI tools.
- [ ] We know where our customer data is stored.
  UK GDPR still applies. See ico.org.uk for guidance.
- [ ] A person approves anything AI sends to a customer.

4 Ownership

- [ ] One person owns "AI" for the business.
  Even an hour a week is enough to start.
- [ ] We would measure success with a number.
  Hours saved, leads answered, calls picked up.

8 to 10 ticks

You are ready to build. Pick the task that costs the most hours and automate that first.

4 to 7 ticks

Close the gaps in sections 2 and 3 first. They are quick, and they make AI safe to use.

0 to 3 ticks

Start with a map of where your time goes. That is exactly what our free 20-minute call does.

Want a second pair of eyes?

Book a free 20-minute call. We map the busywork, show you what is worth automating, and give you a clear idea of cost before you spend a penny.

Book a free 20-minute call

What we build for UK & EU businesses: **AI Strategy & Audit** (starts with a free 20-minute call), **AI Receptionist**, **AI Automation**, **Sales Automation**, **Custom AI Agents**, **Microsoft 365 & Copilot**, **Intelligent Dashboards**, **No-Code AI Apps** and **AI Search Visibility**. Custom builds from £999. Human-approved, UK-built. **apps365.ai**

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