Out of Office Connect

FREE WORKING WORKSHEET

Before You Buy More AI

7 Questions Every Small Business Should Answer First

Use this as a 20–30 minute team conversation.

Bring together two to five people who know how the work actually gets done. You do not need perfect answers. The questions you cannot answer clearly are often the best clues about where to start.

Start with the business, not the technology.

1. What business problem are we actually trying to solve?

What is taking too long? Where are mistakes happening? What frustrates employees or slows customers down? Where are good people spending time on work that keeps them away from more valuable responsibilities?

OUR NOTES

2. How is our team already using AI?

Who is already using AI? Which tools? For what? What has worked well? Has anyone shared useful approaches with the rest of the team?

OUR NOTES

THE 7 QUESTIONS

3. Do our people know what information they can and cannot use with AI?

Which AI tools has the company approved? What customer, personal, financial, contractual, proprietary, or other sensitive information should never be entered? What does responsible use look like here?

OUR NOTES

4. Where is repetitive office work taking time away from better work?

Look at estimates, customer follow-ups, service notes, internal communication, procedures, training materials, meeting summaries, research, scheduling support, and sales preparation. If time were saved here, what would people do with it instead?

OUR NOTES

5. Who inside the company understands that work best?

Who knows the customers, workflows, systems, and day-to-day realities? Who does everyone ask when they need to understand how something really works? Technical expertise is useful; business judgment matters too.

OUR NOTES

PROVE VALUE BEFORE YOU INVEST MORE

6. Can we prove value with what we already have before buying more?

Can an approved AI tool and one well-defined workflow demonstrate the opportunity first? Did it save meaningful time, improve quality, get used by the team, or improve the customer experience?

OUR NOTES

7. What would have to be true before a larger investment makes sense?

What evidence would justify more technology, integration, automation, outside expertise, or an enterprise system? Hours saved? Faster response? Better consistency? More capacity? Higher sales productivity? Reduced risk?

OUR NOTES

What did we learn?

The first workflow or problem we should investigate:

The person or people who should help lead this:

The guardrail or policy question we need to clarify first:

What would justify investing more:

Don’t buy the transformation before you know what you’re transforming.

Learn first. Prove value. Invest second.

If these questions exposed gaps, that is useful. The OOC Guided Rollout is designed to help your team turn those gaps into a practical plan.

outofofficeconnect.com