The Practical AI Adoption Workbook for Small Businesses

A short workbook for choosing one useful AI pilot, estimating its real cost, setting safeguards and measuring whether it saves meaningful time. Work through it with the people who do the task today.

Part 1: Pick the right first task

Good first pilots are frequent, low-risk, easy to check and currently time-consuming. Score each candidate from 1 (low) to 5 (high).

Task: _____ Frequency: ____ Time spent: ____ Ease of checking: ____ Risk if wrong (reverse): ____

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Chosen pilot task: _____

Part 2: Measure the starting point

Hours spent on this task per week today: _____

Typical error or rework rate today: _____

How quality is judged today: _____

Part 3: Build a test set

- ☐ 20 to 30 real examples collected
- ☐ Personal and confidential data removed
- ☐ Expected good answers written for each example
- ☐ Awkward and edge cases included

Part 4: Check data handling before anything else

- ☐ Our inputs are not used to train the vendor's models (confirmed in writing)
- ☐ We know where data is stored and for how long
- ☐ Access control and audit logs meet our needs
- ☐ We can export and delete our data
- ☐ The tool fits our AI use policy

If any box cannot be ticked, stop here and choose another tool.

Part 5: Estimate the real cost (per month)

Licences: _____ Setup and integration (spread over 12 months): _____

Training time: _____ Review time AI output still needs: _____

Usage-based charges: _____ Total: _____

Part 6: Safeguards

- A named person reviews every output before it is used or sent.
- Facts, numbers and references are checked against original sources.
- Customers are told when they are interacting with AI.
- There is a simple way to report mistakes.

Part 7: Run a two- to four-week pilot

Pilot team (3 to 5 people, including one sceptic): _____

Start date: _____ Review date: _____

Part 8: Decide

Hours saved per week (after review time): _____

Quality compared with before: better / same / worse

Decision: adopt / adopt with changes / stop

Conditions for use: _____

Next review date: _____

More guides: www.flexyblogs.com/blog/how-to-evaluate-an-ai-tool