

Innoviva AI Readiness Checklist

Discover which processes in your business are ready to automate today.
Click every checkbox that applies — your score is on the final page.

www.innovivasolution.com

27

AI-automatable process checks

\$40K+

Average annual saving per business

Work through each section and **click every checkbox** that currently applies to your business. The more you tick, the greater your automation opportunity. Your final score on the last page reveals your AI readiness level and ROI.

How to use this checklist

1. Click each checkbox that applies to your business today.
2. Complete all 5 sections — each covers a different operational area.
3. Your **Total Ticks** counter on the final page updates live.
4. Book your free audit at www.innovivasolution.com.

01 | CUSTOMER COMMUNICATION & LEAD HANDLING

How your team handles inbound enquiries, follow-ups, and lead qualification.

- Do you manually answer the same customer questions repeatedly?**
FAQ handling is one of the fastest AI wins — voice or chat agent in days.
- Do leads ever go uncontacted for more than 2 hours?**
AI agents follow up within seconds, 24/7 — zero leads ever slip through again.
- Does your team manually qualify leads before passing to sales?**
AI scores, qualifies, and routes leads automatically based on your criteria.
- Do you book appointments or calls manually via email or phone?**
AI scheduling agents eliminate back-and-forth and sync to your calendar.
- Do you send follow-up messages to prospects manually?**
Automated AI sequences nurture leads continuously without human involvement.
- Do customers ever complain about slow response times?**
AI agents respond instantly — no hold music, no wait times, no lost leads.

02 | ADMIN, DATA ENTRY & REPORTING

Repetitive manual tasks that consume your team's time and are highly automatable.

- Does your team copy data between systems manually?**
Process automation syncs data across all your tools in real time.
- Do you create reports or dashboards manually each week or month?**
AI Analytics auto-generates and distributes scheduled reports without effort.
- Are invoices, quotes, or proposals created manually each time?**
Document generation automation produces these in seconds from a template.
- Does your team chase unpaid invoices or overdue tasks manually?**
Automated reminder sequences handle all follow-ups without staff involvement.
- Do you manually update your CRM or contact database?**
AI updates records automatically based on email, call, and form activity.
- Are there spreadsheets that multiple people update manually?**
Central automated pipelines eliminate version control issues permanently.

03 | CUSTOMER SUPPORT & SERVICE DELIVERY

How efficiently your business handles post-sale service, queries, and complaints.

- Do customers contact you with repetitive support queries?**
AI handles Tier 1 support automatically — escalating only complex cases.
- Does your team spend time onboarding new clients manually?**
AI employee workflows automate entire onboarding journeys end-to-end.
- Are customer satisfaction surveys sent and collected manually?**
Automated survey dispatch and collection saves hours of admin every week.
- Do service issues or complaints sometimes fall through the cracks?**
AI triage ensures every issue is logged, assigned, and tracked automatically.
- Is your support team unavailable outside of business hours?**
AI agents provide 24/7 coverage — nights, weekends, and holidays included.

04 | MARKETING & CONTENT OPERATIONS

Your approach to content creation, email campaigns, and social media management.

- Do you manually write and schedule social media posts?**
AI content pipelines research, write, and publish posts automatically.

- Are email campaigns built and sent manually each time?**
AI-driven sequences personalise and send emails on live behaviour triggers.

- Does your team spend time creating first drafts of content or copy?**
AI drafting tools cut content creation time by 60–80% across all formats.

- Do you manually monitor competitor activity or industry news?**
AI monitoring agents surface relevant intelligence into your inbox daily.

- Are ad performance reports pulled and reviewed manually?**
Automated dashboards update in real time with zero manual effort required.

05 | FINANCE, HR & INTERNAL OPERATIONS

Back-office processes where automation consistently delivers the highest savings.

- Is employee onboarding handled manually via emails and documents?**
AI workflows automate every step from offer letter to first-day setup.

- Do you manually track staff hours, leave, or performance data?**
Automated HR pipelines collect and report all data without manual input.

- Are expense claims or purchase approvals processed manually?**
Approval workflows automate routing, reminders, and sign-off chains.

- Do you manually reconcile financial data between systems?**
AI automation syncs accounting, banking, and operational data in real time.

- Are there compliance tasks requiring manual evidence collection?**
Automated audit trails capture and store evidence continuously and accurately.

TOTAL TICKS

Updates automatically as you tick checkboxes above

What Your Score Means

0 – 5

Early Stage

Beginning of your AI journey. Even 2–3 quick automations could save 5+ hours/week and \$500–\$2,000 per month straight away.

6 – 12

Growth Ready

Significant opportunity across your operations. A structured AI rollout could save \$20,000–\$60,000 annually in staff time and operational cost.

13 – 20

High Potential

Substantial processes ready to automate right now. A full AI transformation could 3x your operational efficiency within months.

21 – 27

Transformation Ready

High-volume automatable work across every function. An AI-first model could fundamentally change your cost structure and growth ceiling.

Book Your Free 20-Minute Strategy Call →

[Click here to choose a time that suits you](#)

Ready to turn your ticks into a real AI plan?

Book your free 20-minute AI Strategy Call above. We'll walk through your checklist results, identify your top 3 automation opportunities, and deliver a clear roadmap with realistic ROI estimates — no cost, no obligation.

Email: sales@innovivasolution.com

© 2025 Innoviva Solution. All rights reserved. This document is for informational purposes only.