



12

FREE GUIDE

The 2-minute AI readiness check

Last checked: 27 September 2026 · 22 minute read · For owners, no tech needed

INSIDE

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The plan

1. Answer the 10 questions below and add up your points in four areas: customers, marketing, admin and team. It takes about two minutes.
2. Read what your total means, then rank your areas to find your top three wins and the guide to read for each.
3. Use the starter prompt for win #1 this week, then follow the 30-day plan in section 6.

Try this now: the 10-question check

Answer for a normal week, not the week you wish you had. Circle one answer per question and write down its points. A high score doesn't mean you're doing badly. It means there's time to get back.

Print this page or keep a note open beside it.

Customers

1. A call comes in and nobody can pick up. What usually happens?

- Someone always answers, or calls back within the hour: **0**
- It goes to voicemail and we call back later that day: **1**
- We call back the next day, sometimes not at all, or I honestly don't know: **2**

2. A new enquiry arrives by your website, email or social media messages. How fast does it get a real reply?

- Within an hour during working hours: **0**
- The same day: **1**
- The next day or later, or it depends who's in: **2**

3. You send a quote, estimate or booking offer and hear nothing back. What happens next?

- We follow up on a set day, every time: **0**
- Sometimes, when someone remembers: **1**
- We rarely follow up, or we wait for them to come back: **2**

Marketing

4. When did you last ask a happy customer for a Google review?

- It happens after every job or visit, by text or email: **0**
- In the last month, by hand: **1**
- I can't remember: **2**
- We never have, or I don't know where to find the review link: **3**

5. How often do you put something new in front of customers (a social post, a newsletter, a website update)?

- Every week: **0**
- About once a month: **1**
- A few times a year: **2**
- Almost never, or our website hasn't changed in over a year: **3**

Admin

6. How long do you personally spend on email and messages on a normal day?

- Under 30 minutes: **0**
- 30 to 90 minutes: **1**
- More than 90 minutes, or it spills into evenings: **2**

7. Invoices, bookkeeping and forms. When do they get done?

- A bookkeeper or software handles most of it and I barely touch it: **0**
- I do some every week, during working hours: **1**
- It piles up and I do it at night or on weekends: **2**

8. How do customers get reminded about appointments, bookings or scheduled jobs?

- Our booking tool sends reminders automatically: **0**
- We call or text them by hand: **1**
- Mostly they don't, and no-shows or "I forgot" happen: **2**

If you don't take bookings or schedule jobs at all, score 0.

Team

9. If your most experienced staff member were off for two weeks, could someone else follow written steps for their main jobs?

- Yes, it's written down and up to date: **0**
- Some of it is written down: **1**
- It's mostly in their head: **2**
- It's all in my head, or I work alone and nothing is written down: **3**

10. Who in your business uses an AI tool like ChatGPT or Claude today?

- Several of us, with shared rules on what never gets pasted in: **0**
- A few people, each in their own way: **1**
- Only me, now and then: **2**
- Nobody, or I'm not sure: **3**

Your score sheet

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Customers (questions 1, 2, 3): ___ out of 6 Marketing (questions 4, 5): ___ out of 6 Admin (questions 6, 7, 8): ___ out of 6 Team (questions 9, 10): ___ out of 6

Total: ___ out of 24

My highest area: ___ **My second:** ___ My third: _____ The question where I scored most points in my highest area: ___

My win #1 is _____. This week I'll do it by hand, _____ times.

Each area is out of 6, so you can compare them straight across. Before you fix anything, count how often the problem actually happens this week: each missed call, each late reply, each quote that went quiet. A tally on paper is fine.

What your total means

Your total is out of 24. It tells you how much of your week goes on jobs a chatbot or a simple automation could take off your plate. It says nothing about how good your business is.

Total	What it means	Where to start
0 to 6	Things run tight. AI will save you minutes a week, not hours.	Whichever area scored highest, if any question in it scored 2 or more. If none did, there's nothing to fix yet. Retake the check in three months.
7 to 12	A few clear leaks, usually in one or two areas.	Your top two areas. These are the easiest wins to spot and feel.
13 to 18	Hours go out every week on work that repeats.	Your highest area only, for the whole first month.
19 to 24	Nearly everything runs through you, and some of it falls through the gaps.	One thing. Pick win #1, do it properly, and leave the rest until it's a habit.

A high total tempts people to change five things in one week. Then none of them sticks. Do less at a time.

If you scored 2 on question 1 or question 2, treat it as urgent, whatever your total. Every other question is about saving your time. These two are about new customers you're losing right now.

Your three wins

1. **Rank your four areas from highest to lowest.** Your highest area gives you win #1, the second gives win #2 and the third gives win #3.
2. **Break ties in this order:** customers, admin, marketing, team. Customers goes first because a missed customer is gone for good. An unwritten how-to will still be unwritten next week.
3. **Inside each area, pick the question where you scored most points.** That's your win for the area. If two questions tie, pick the one that annoys you more.
4. **Skip any area where you scored 0 or 1.** There isn't enough there to bother with yet. Move to the next area down.

Each question has one win in sections 2 to 5, with a starter prompt, what to check, and whether a chatbot is enough or you'll need something set up. The last column is the guide to read once that win is running.

Question	Area	Your win	Read next
1	Customers	Win 1: never leave a missed call in silence	AI receptionist
2	Customers	Win 2: answer every enquiry the same day	First automation
3	Customers	Win 3: chase quotes without feeling pushy	Copy-paste AI workflows

Question	Area	Your win	Read next
4	Marketing	Win 4: ask every customer for a review	Get found
5	Marketing	Win 5: a month of posts from one true fact	AI content kit
6	Admin	Win 6: a reply for every question you answer twice	30 prompts
7	Admin	Win 7: turn the paperwork pile into a list	AI tool stack
8	Admin	Win 8: reminders that stop no-shows	AI tool stack
9	Team	Win 9: get the jobs out of people's heads	Copy-paste AI workflows
10	Team	Win 10: one page of AI rules for the team	AI team in 30 days

Read the guide for win #1 first and leave the others until it's running. If you've never opened ChatGPT or Claude, start with the [ChatGPT and Claude guide](#) whatever your scores. And if you're curious about tools that carry out tasks rather than just write, [AI agents at work](#) covers what to hand over and what to keep.

1. Start here if you've never used AI

AI tools like ChatGPT and Claude are chatbots. A chatbot is a website or phone app where you type a message and it writes an answer back, like texting an assistant who replies in seconds. ChatGPT is made by OpenAI and Claude by Anthropic. Both have free plans, and every starter prompt in this kit works in either. Go to chatgpt.com or claude.ai and sign up with your email.

A prompt is the message you type to it. This kit gives you one ready-made prompt per win. Copy it, change the parts in [square brackets] to your own details, paste it in and send.

Some wins need only a chatbot. Others need a tool that runs by itself. A chatbot writes things: a reply, a template, a checklist. It can't answer your phone or send a text on its own. Anything that happens without you, like a text going out when you miss a call, needs a service set up to do it. Every win below says which kind it is, so you know what you're taking on before you start.

It can be wrong while sounding sure. It may invent an opening time or a price. Read everything before you use it.

Keep private details out. Don't paste customer names, phone numbers, addresses, health details or account numbers. Write "Customer A" instead.

Canadian rules still apply. Canada's anti-spam law (CASL) covers commercial emails and texts, and privacy law covers what you do with customer information. This kit points out where those come up. It isn't legal advice, so check anything you're unsure about with a professional.

Words you'll see

Word	What it means
Prompt	The message you type to the chatbot.
[Brackets]	The parts of a prompt you replace with your own details.
Template	A message you save and reuse, changing only the details.
Automation	A task that runs by itself once it's set up, like a reminder text that goes out the day before every booking.
Missed-call text-back	A text sent automatically to someone whose call you couldn't answer, so they know you'll get back to them.
AI receptionist	A phone service that answers calls with a voice, takes messages and answers common questions when you can't pick up.
Review link	A web address from your Google Business Profile that takes a customer straight to the box where they write a review.
Google Business Profile	Your free listing on Google Search and Maps: hours, phone number, photos, reviews.
CASL	Canada's anti-spam law. It sets rules for sending commercial emails and texts.
How-to	Written steps for a job, clear enough that someone new could follow them.

2. Customers: the wins behind questions 1 to 3

Win 1: never leave a missed call in silence

What it does: gives every caller you miss a quick answer, so they don't ring the next business on the list.

When to use it: you scored 1 or 2 on question 1.

The starter prompt:

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I run [business name], a [type of business] in [city]. When I miss a call, I want to send the caller a short text. Write three versions under 160 characters each so each fits in one text: one for working hours, one for evenings, one for weekends. Each should say sorry we missed you, say when we'll call back [for example: within two hours on weekdays], and offer a way to book or ask a question now [link or "just reply to this text"]. Plain, friendly, no exclamation marks, no emoji.

What to check: only promise a call-back time you'll keep every time. "Within two hours" that turns into two days is worse than "tomorrow morning".

What it takes to run: the chatbot writes the messages. Sending them automatically needs a phone service that supports missed-call texts, so ask your provider. Until then, send them by hand. The caller contacted you first, so replying to them directly is fine under CASL. Adding them to a promotions list is a different matter. If you want a phone that answers with a voice and takes the details, see the [AI receptionist guide](#).

Win 2: answer every enquiry the same day

What it does: gives you ready replies to the questions new customers ask most, so answering an enquiry takes a minute instead of waiting for a free half hour.

When to use it: you scored 1 or 2 on question 2.

The starter prompt:

COPY THIS

Here are the questions new customers ask us most, with my rough answers: [paste your list, for example: do you service my area, how soon can you come, do you do weekends, what do I need to bring]. Turn each into a ready-to-send reply of 40 to 80 words. Keep my facts exactly as I wrote them and improve only the wording. Where a reply needs something from the customer (an address, a photo, a date), end by asking for it. If any answer of mine is unclear, ask me before writing it.

What to check: every fact is yours, word for word, from service area and hours to what you do and don't do. Save the replies where everyone can copy them, such as saved replies in your email or a shared document.

What it takes to run: a chatbot is enough to write these. Someone still has to send them. A tool that answers the questions itself, day and night, is a bigger setup: see the [first automation guide](#).

Win 3: chase quotes without feeling pushy

What it does: gives you a short, friendly follow-up for every quote that goes quiet, and a day to send it.

When to use it: you scored 1 or 2 on question 3.

The starter prompt:

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We send quotes for [type of work]. Customers often go quiet after getting one. Write two follow-up messages I can send by email or text: one for [number] days after the quote, one for [number] days after that. Each under 60 words. Remind them what the quote was for, make it easy to ask a question, and make it just as easy to say "not now". The second one should be the last, and should say so kindly. No pressure, no fake deadlines, no discounts.

What to check: the second message really is your last. Write the follow-up days in your calendar or on the quote itself, so it happens every time and not only when someone remembers.

What it takes to run: a chatbot gives you the messages in five minutes. Sending them on time is the hard part. Either build a habit (one daily calendar reminder that says "chase quotes") or use a tool that sends them for you. Your quoting or invoicing app may already have follow-up settings, so look there first. [Copy-paste AI workflows](#) has more on turning this into a routine.

3. Marketing: the wins behind questions 4 and 5

Win 4: ask every customer for a review

What it does: makes asking for a Google review a normal step at the end of every job or visit, instead of something you keep meaning to do.

When to use it: you scored 2 or 3 on question 4.

The starter prompt:

COPY THIS

Write a short message we can send by text or email after a finished [job / appointment / order], thanking the customer and asking if they'd leave a Google review at [review link]. Under 50 words, warm, easy to ignore. Write two versions: one for a customer we know well, one for a first-timer. Don't offer anything in return for the review.

What to check: you have your real review link. Google's Business Profile help pages explain how to get a review link or QR code; look in the section on managing reviews. Google doesn't allow offering a discount or anything else in exchange for a review.

What it takes to run: a chatbot writes the message. Sending it after every job means one person owns the step, or an automation sends it when a job is marked done. Ask everyone, not only the customers you expect to be happy. The [get found guide](#) covers reviews and the rest of your Google listing.

Win 5: a month of posts from one true fact

What it does: turns one real thing about your business into several short posts, so you have something to say without making anything up.

When to use it: you scored 2 or 3 on question 5.

The starter prompt:

COPY THIS

Here is something true about my business: [for example: a job we finished this week, a question customers keep asking, a change to our hours, a new staff member]. Write four short social posts from it, each from a different angle. Under 60 words each. Plain words, no hype, no emoji, no hashtag walls. Use only the facts I gave you, and put [?] where you need a detail from me.

What to check: fill every [?] with a real detail or cut it. No made-up numbers, customer quotes or claims. If a post mentions a customer's job or home, get their permission first.

What it takes to run: a chatbot is enough, plus twenty minutes once a week to pick a fact and post. The [AI content kit](#) has the fuller system for posts, short videos and ads.

4. Admin: the wins behind questions 6 to 8

Win 6: a reply for every question you answer twice

What it does: sorts your inbox into what needs you and what doesn't, and turns the replies you type most into templates.

When to use it: you scored 1 or 2 on question 6.

The starter prompt:

COPY THIS

Here are the subject lines and first lines of my last [number] emails, with names and contact details removed: [paste]. Sort them into four groups: needs me today, someone else could answer, a saved template would answer it, and can be ignored or unsubscribed. Then list the five questions that come up most and draft a reusable reply for each. Leave any fact you're unsure of in [brackets].

What to check: nothing personal went in. Strip out names, email addresses and account details before you paste. Then fill every bracket with the real answer and save the replies as templates in your email program.

What it takes to run: a chatbot is enough for this one. The [30 prompts guide](#) has more for email, and the [ChatGPT and Claude guide](#) shows how to set up the chatbot so it already knows your business.

Win 7: turn the paperwork pile into a list

What it does: takes the pile you've been avoiding and turns it into a short, ordered list you can get through in working hours.

When to use it: you scored 2 on question 7.

The starter prompt:

COPY THIS

I'm behind on paperwork. Here's what's in the pile, in my own words: [for example: 12 receipts to enter, 3 invoices not sent, a supplier form, a renewal letter I haven't read]. Put it in order: what costs me money or causes a problem if it waits, what just needs 10 minutes, and what can wait a week. Then give me a plan for three 30-minute sessions this week, with what to do in each.

What to check: the chatbot doesn't know your deadlines unless you tell it. Add the due dates you know (tax filings, renewals, payroll) and check the order against them. For anything to do with tax, ask your bookkeeper or accountant.

What it takes to run: a chatbot is enough to plan the work. Doing it faster is where tools come in, like bank feeds and receipt capture in bookkeeping software. Start with what you already pay for, and use the [AI tool stack](#) to sort out what's worth adding. Keep account numbers and customer details out of the chatbot.

Win 8: reminders that stop no-shows

What it does: sends every customer a clear reminder before their appointment or scheduled job, so fewer people forget.

When to use it: you scored 1 or 2 on question 8.

The starter prompt:

COPY THIS

Write appointment reminder messages for my [type of business]. I need three: one sent [2 days] before, one the morning of, and one to send if they don't show up. Each under 160 characters so it fits in one text. Include [date and time], [address or "we'll come to you"], what to bring or do before we arrive [notes], and how to reschedule [phone or link]. Friendly and clear, no exclamation marks.

What to check: the reschedule step works. Call your own number or click your own link.

What it takes to run: a chatbot writes the messages. Sending them automatically needs a booking or scheduling tool with reminders built in, and most have one. Look in your booking tool's settings for notifications or reminders before you buy anything.

5. Team: the wins behind questions 9 and 10

Win 9: get the jobs out of people's heads

What it does: turns someone talking through a job into written steps someone else can follow.

When to use it: you scored 2 or 3 on question 9.

The starter prompt:

COPY THIS

Here's a transcript of [me / our lead hand / our office manager] explaining how we [open up / close / do a standard job / handle a new booking]: [paste]. Turn it into numbered steps a new staff member could follow without asking anyone. Keep it to one page. Flag any step that's missing, any step that depends on one person's memory, and any safety step that needs to be checked by a person.

What to check: the person who does the job reads the steps and fixes them, because the chatbot will miss what's obvious to them and not to a newcomer. (A transcript is the written-out text of a recording.)

Many phone voice-memo apps can make one, or you can tap the microphone in the chatbot app and talk.)

What it takes to run: a chatbot is enough. The harder part is getting ten minutes with the person who knows the job, so do one job a week. For safety procedures and anything regulated in your trade, have a qualified person sign off on the written version.

Win 10: one page of AI rules for the team

What it does: gives everyone the same short rules for using AI at work, so people can use it without guessing what's allowed.

When to use it: you scored 2 or 3 on question 10, or 1 if everyone is using it differently. If you work alone, write it for yourself in three lines and move on.

The starter prompt:

COPY THIS

Write a one-page guide for staff at my [type of business] on using AI chatbots at work. Cover: what they can use it for [for example: drafting emails, checklists, rewording], what never gets pasted in (customer names and contact details, health or financial information, passwords, anything confidential), that everything it writes gets read before it's used, and who to ask when unsure [name or role]. Plain words, under 300 words, no scare tactics.

What to check: the rules match how your business handles personal information. Canada's privacy laws (PIPEDA federally, and provincial acts in BC, Alberta and Quebec) apply to customer and staff information. If you're unsure which applies to you, check with a professional.

What it takes to run: a chatbot writes the page in a minute. Getting a team to use AI well takes a few weeks of showing people, sharing prompts that worked and answering questions. The [AI team in 30 days guide](#) is a week-by-week rollout, and [learn AI in 30 days](#) is fifteen minutes a day for you personally.

6. Your 30-day plan

Fifteen to thirty minutes a few times a week, one win at a time.

Week 1: set up and try win #1

- [] Make a free account on ChatGPT or Claude, if you haven't already

- ☐ Save a short description of your business in its settings, so every chat knows who you are (the [ChatGPT and Claude guide](#) shows where)
- ☐ Run the starter prompt for win #1 and fix the answer until you'd use it
- ☐ Use the result by hand at least three times this week
- ☐ Keep your tally going all week. You want your own count, not a guess.

Week 2: make win #1 a habit

- ☐ Put the template or message where everyone who needs it can find it
- ☐ Pick one person who owns the step, even if that's you
- ☐ Check whether a tool you already have can send it automatically (phone service, booking tool, email, invoicing app)
- ☐ Compare this week's count with last week's. Keep what helped and change what didn't.

Week 3: add win #2

- ☐ Run the starter prompt for win #2
- ☐ Use it by hand for the week

Week 4: add win #3 and take the check again

- ☐ Run the starter prompt for win #3
- ☐ Retake the 10 questions. Your first area should have dropped by a point or two. If it hasn't, the step isn't happening every time yet, so go back to week 2 for that win before adding more.
- ☐ Decide what's next for each win: keep doing it by hand, set up the tool you already have, or hand it to someone else

Take the check again every three months. Your top area will move as the first ones get fixed.

7. Worked examples

These are made-up businesses, written to show how the check turns into a plan. They aren't customers.

A plumbing company, 6 staff

The owner scores customers 6, admin 4, team 4 and marketing 3, for a total of 17. Question 1 hurts most: calls go to voicemail while everyone's on a job, and he doesn't know how many get returned. So win #1 is the missed-call text. For the first week he sends them by hand from his phone at lunch and at the end of

the day, keeping a tally on the back of an invoice pad. In week 2 he calls his phone provider and asks whether they can send the text automatically.

Admin and team tie at 4, so admin goes next. His highest admin question is 7, the paperwork pile, so that's win #2. Question 3 still scored 2, but it's in the same area as win #1, so it waits. Team is his third area, so win #3 comes from question 9 or 10 in week 4, and marketing waits for next month.

A physiotherapy clinic, 14 staff

The clinic manager scores admin 4, marketing 4, team 4 and customers 2, for a total of 14. Her 2 in customers is all from question 3, so nothing is urgent. Three areas tie at 4, so the tie order decides: admin first, then marketing, then team.

Her highest admin question is 6, since she spends most evenings on email. She runs win 6, finds that a big share of her inbox is the same six questions, and saves six templates the front desk can use too. In week 3 she adds win 4 from marketing, and the front desk sends the review message after each visit. In week 4 comes win 10: she goes through the one-page AI rules at the staff meeting, with a firm line that no patient information goes into a chatbot. Reminders (question 8) scored 0 because the booking system already sends them, so she skips that one.

8. What goes wrong, and how to avoid it

What happens	Why	What to do
You start all three wins in week 1 and none sticks.	Each new step needs a habit, and habits take a couple of weeks.	One win at a time. Add the next only when the first happens without thinking.
The template is great and nobody uses it.	It's saved somewhere only you can find.	Put it where the work happens: saved replies in email, a note on the shared phone, a printed sheet by the till.
The missed-call text promises a call back that doesn't come.	The text was set up. The call-back step wasn't.	Change the promise to one you keep, and name who makes the calls.
The chatbot invented a fact.	It fills gaps with things that sound right.	Tell it "only use what I gave you, leave gaps in brackets", and check every date, price and phone number.

What happens	Why	What to do
Staff pasted customer details into a chatbot.	Nobody said not to.	Win 10. Say it out loud at a team meeting and put it in writing.

Replying to someone who contacted you is normal business. Promotions and newsletters by email or text fall under CASL, with rules on consent, saying who you are and letting people unsubscribe. Before messaging customers who haven't asked to hear from you, check the rules with a professional.

9. Printable checklist

Every time AI writes something for us

- ☐ Every [bracket] is filled in or removed
- ☐ No customer or staff names, contact details, health or financial information went in
- ☐ Every date, price, time and phone number is checked against the real thing
- ☐ It promises nothing we haven't agreed to
- ☐ Commercial emails and texts say who we are and give a way to stop

If you'd rather hand it over: most of the wins in this check are work Joe sets up at Droom. That means an AI receptionist that answers when you can't, missed-call text-back, website enquiries answered, quotes chased, and review requests sent after every job. He also builds websites with Google Business Profile setup, structured data and llms.txt included, and runs loyalty programs if repeat customers matter to you. The chatbot prompts above are yours to use either way. [Book a quick call](#) and he'll tell you honestly whether it's worth it for your business.