

AI Readiness Scorecard

A 5-minute self-check for home services owners and managers | John H. Hodsdon

How to use it: Circle the answer that fits how things usually go today, not how you'd like them to go. Points are in the top row. Add up each area, then your total.

Please note: this is a simple self-check, not a scientific or validated test. It's meant to help you see where AI might help first.

Question	0 points	1 point	2 points	3 points
Lead response				
L1. When a new lead comes in during business hours, how fast does someone usually reply?	☐ Next day or later	☐ Same day, after a few hours	☐ Within an hour or so	☐ Within minutes, most times
L2. What happens to leads that come in after hours or on weekends?	☐ They wait until someone gets to them	☐ Someone checks when they can	☐ They get a reply, but not every time	☐ Every one gets a reply and is logged
Scheduling				
S1. How does the daily schedule get built?	☐ In one person's head	☐ On a whiteboard or paper	☐ In a calendar or software, but changes are hard to track	☐ In software the team uses, kept up to date
S2. When a job runs long or a tech is out, how does the customer find out about the change?	☐ Often they don't	☐ Someone calls if they remember	☐ Usually, but it depends who's in the office	☐ There's a set way, and it happens every time
Paperwork				
P1. How much of the office's week goes to typing the same details into more than one place?	☐ Most of the week	☐ A good part of the week	☐ Some, here and there	☐ Very little
P2. When a job is done, how does the invoice go out?	☐ When someone gets to it, sometimes days later	☐ Within a few days	☐ Same or next day, by hand	☐ Right away, with a set process
Estimating				
E1. How do estimates get put together?	☐ From memory each time	☐ By copying an old estimate and changing it	☐ From a price list or template	☐ From a template with past job data and current costs
E2. On a typical job, how long does a customer wait for an estimate?	☐ More than a week	☐ Several days	☐ A day or two	☐ Same day, most times
Follow-up				
F1. After a job is done, does the customer hear from you again?	☐ Rarely	☐ Only if there's a problem	☐ Usually a thank-you or check-in	☐ Every time, with a set follow-up
F2. When an estimate goes out and the customer goes quiet, what happens?	☐ Nothing	☐ Someone follows up if they remember	☐ We follow up once	☐ We follow a set schedule and track it
Written processes				
W1. How many of your key processes are written down?	☐ None	☐ One or two	☐ Several, but some are out of date	☐ Most, and they're kept current
W2. If your office manager or lead tech were out for two weeks, how would things go?	☐ Things would stall	☐ We'd get by, with a lot of calls to them	☐ Mostly fine, with a few gaps	☐ Fine; someone could follow the written steps
Data in one place				
D1. Where do customer and job details live?	☐ In texts, notebooks, and people's heads	☐ In several places that don't connect	☐ Mostly in one system, plus side notes	☐ In one system the team uses every day
D2. Could you pull a list of last month's jobs, with lead source and amount billed, in under an hour?	☐ No	☐ Maybe, with a lot of digging	☐ Yes, with some cleanup	☐ Yes, easily

Your tally. Add the two answers in each area (0 to 6), then add the areas for your total (0 to 42).

Lead response	Scheduling	Paperwork	Estimating	Follow-up	Written processes	Data in one place	Total

My lowest area: _____ *If two areas tie, start with the one that causes the most headaches.*

Where to start. Find the band that holds your total.

☐ 0 to 14 points Start With the Basics A fine place to start. Read the free white paper, AI in Home Services: A Plain Look at Where It Helps First.	☐ 15 to 28 points Map One Process Map one process from your lowest area with the free Process Mapping Worksheet before you try AI on it.	☐ 29 to 42 points Ready for a First Project Try one small AI project and measure it. See the 100-day plan in Rethinking Business in the Age of AI.
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Whatever your score, pick one process and follow three steps: **Map Your Business, Design the Fix, Build and Test.** Free resources and an online version are at agenticsolutions.biz.