

A 5-MINUTE CHECK FOR GROWING BUSINESSES

Can your business data answer useful questions?

Use these 15 questions to see what your team can answer today, where manual effort is hiding, and which question could become a focused AI or reporting pilot.

01

Answer honestly
Score the business as it operates today - not after a planned cleanup.

02

Notice the effort
A correct answer that takes half a day is still an opportunity.

03

Choose one question
The goal is a useful first pilot, not a company-wide data program.

How to score each question

0	Not today	The information is not captured or the business cannot answer.
1	Not reliably	Different people produce different answers, or important information is missing.
2	With manual work	The answer is available, but someone must search, reconcile, or rebuild it.
3	Quickly	The answer is consistent, timely, and traceable to the source.

The score is a conversation starter, not a maturity certification. A question scored 2 can be an excellent opportunity because the answer already exists and the manual burden is visible.

Part 1: Questions that run the business

Circle one score for each question. If the answer varies by team, score the least reliable version.

Customers and sales

#	QUESTION	0 NOT TODAY	1 NOT RELIABLY	2 MANUAL WORK	3 QUICKLY
1	Which customers have bought less, ordered less often, or stopped engaging over the last 90 days?	—	—	—	—
2	Which open leads or proposals need a follow-up this week?	—	—	—	—
3	Which products or services generate the strongest gross margin?	—	—	—	—
4	Which marketing or referral sources produce the customers most likely to buy again?	—	—	—	—
5	Which customer questions, complaints, or service requests keep appearing?	—	—	—	—

Finance and operations

#	QUESTION	0 NOT TODAY	1 NOT RELIABLY	2 MANUAL WORK	3 QUICKLY
6	Which invoices are overdue, and has anyone followed up with the customer?	—	—	—	—
7	Which projects or jobs are running over their original time or cost estimate?	—	—	—	—
8	Which active commitments are at risk of missing a customer deadline?	—	—	—	—
9	Where is rework, waiting, or repeated data entry slowing the team down?	—	—	—	—
10	Which recurring report consumes the most staff time to prepare?	—	—	—	—

PAGE SCORE: _____ / 30

Part 2: Can the answer be trusted?

Conversational access is useful only when people understand the source, meaning, access, and limits of the answer.

Knowledge and data foundations

#	QUESTION	0 NOT TODAY	1 NOT RELIABLY	2 MANUAL WORK	3 QUICKLY
11	Can employees quickly find the current version of an important policy, procedure, price, or product answer?	—	—	—	—
12	Can an important number in a report be traced back to the records that produced it?	—	—	—	—
13	Do sales, finance, and operations use the same definitions for the metrics they share?	—	—	—	—
14	Is it clear who owns each important source and who is allowed to see sensitive information?	—	—	—	—
15	Can the current process say 'we do not have enough information' instead of forcing an answer?	—	—	—	—

TOTAL SCORE: _____ / 45

What your total suggests

0-14	Clarify the foundations Choose one important question. Decide what information should answer it, where that information should live, and who owns its definition.
15-29	A focused opportunity is visible Look for questions scored 2. They already have business value and measurable manual effort. Improve the minimum sources required to answer one of them.
30-45	Consider a conversational-data pilot Choose a high-value recurring question, test it with real examples, expose the source evidence, and begin with read-only answers.

The most useful pilot is not always your lowest-scoring question. Prefer a question that matters frequently, affects a real decision, and can be improved with a small number of accessible sources.

Plan one useful first conversation

Bring this page to a working session with the person who asks the question and the person who knows the underlying information.

1. THE QUESTION

Write one recurring business question worth answering faster or more reliably.

2. THE USER AND DECISION

Who needs the answer, how often, and what decision or action does it support?

3. THE MINIMUM SOURCES

List only the systems, documents, or spreadsheets required for this question.

4. THE DEFINITIONS

Which terms or calculations must everyone interpret the same way?

5. THE PROOF

How will you verify the answer? What should the system show when information is missing?

6. THE RESULT

What will improve: time to answer, manual effort, missed follow-ups, decision speed, or something else?

**Start with one
question worth
answering.**

Ai Applied helps growing businesses connect information, define a focused use case, and build practical AI capabilities around the way the business actually works.

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