

Practical guide: Run an AI audit on your business

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What an AI audit looks at

An AI audit is a structured review of your own operation, carried out before you look at a single tool. It hunts for two things. The first is high-volume, repetitive work you already do: the emails, invoices, data entry and routine reporting that quietly eat hours. The second is high-value work you are not doing at all, because it costs too much or the skill is not in the building.

McKinsey's State of AI, published in November 2025, found that 88% of organisations now use AI in at least one function, up from 78% a year earlier. About 6% attribute more than 5% of their operating profit to it. Adoption is close to universal. Measurable return is rare.

What it is not

It is not a technology review. Around 80% of businesses layer AI on top of how they already work rather than redesigning the work itself, and that is the difference McKinsey found between the businesses earning a return and the rest.

It is not a shopping list. The output is two or three tasks, ranked and scored, each with a named owner, a recorded baseline and one number it has to move. Everything else waits.



What an audit tells you

Salesforce surveyed 3,350 small and mid-sized business leaders in 2025 and found 75% already experimenting with or using AI, with 91% of those users saying it lifts revenue. That last figure is what people reported about themselves, so treat it as opinion. In the UK, the Greater Manchester Chamber of Commerce put the share of small businesses turning AI into real productivity gains at roughly one in ten. Four reasons to run the audit before you buy anything.

What separates them is method

The businesses getting value are not the ones spending most. They matched one tool to one specific, high-value task, then measured what changed. The rest bought AI as a general upgrade and hoped.

It finds capability you could never afford

Sector research, competitor mapping, forecasts, a first draft of a strategy. Work a small business would normally pay a consultancy for or go without. For many owners that uplift is worth more than the hours saved on admin.

It gives you a number to judge renewal against

A subscription with no baseline behind it renews forever. The audit forces you to write down what the task costs today, before anything changes, so you can tell later whether it worked.

It tells you where to say not yet

Low volume, messy data, or a task that needs a person to own the decision. In those cases AI adds cost and risk for very little. Knowing that in advance is worth the afternoon on its own.



Score every task out of thirty

List the candidate tasks, then score each one from 1 to 5 on six factors, where 5 is always the most favourable. Add them up. Anything in the mid-twenties or above is a strong first candidate. This turns a vague plan to try AI into a ranked list you can defend to a board.

Volume	How often the task happens
Time or value	Hours it costs now, or the value it would add
Data quality	How clean and reachable the information is
Low risk	5 where a mistake is cheap and easily caught
Integration	5 where it fits systems you already run
Adoption	How willing the person who would use it is

Score it with the people who do the work, not above their heads. They know which tasks are painful and which tools they will quietly abandon.

The exclude list

Judgement is as much about what you leave out. Four categories belong on a written no-go list, at least for now.

- ☐ Work needing human judgement or accountability: a serious complaint, a redundancy conversation, a sensitive negotiation.
- ☐ Anything touching sensitive customer or financial data before your governance rules are written down.
- ☐ Low-volume, one-off tasks, where set-up and supervision cost more than they save.
- ☐ Processes sitting on scattered or unreliable data, until that data is sorted out.



Six checks before you buy anything

Run every candidate tool through the same six questions. If it cannot clear them, it is the wrong tool however good the demonstration was.

- ☐ Does it fit the exact task from your audit, or would you have to bend it to fit?
- ☐ Does it work with the systems you already use?
- ☐ What are its data and security terms, and where does your information go?
- ☐ Is there a free tier or trial, so you can test it on real work first?
- ☐ How steep is the learning curve for the person who will own it?
- ☐ What is the true total cost against the cost of a person doing the same work?

The true cost is three things

The subscription is the part everyone quotes and the smallest of the three. Add the one-off time to configure and train it, then the weekly time to supervise it, which is highest at the start and falls as it settles.

Most business tools sit between USD 10 and USD 50 per user a month, roughly AED 37 to AED 184 at the pegged rate of 3.6725, checked August 2026. Published prices change often, so confirm before you decide, and add every seat and extra before you compare.

*Adoption is close to universal.
Measurable return is not. The
difference is method.*



Actions to turn AI into a return

01

List the tasks with the people doing them

An afternoon, one room, every function represented. Write down the repetitive work that eats hours, and the valuable work nobody has time or skill to do.

Aim for fifteen to twenty candidates before you narrow anything.

02

Score each one out of thirty

Six factors, 1 to 5, 5 always the most favourable. Use the worksheet on page 9 and score out loud, so disagreements surface.

Rank the list. The mid-twenties and above is where to look first.

03

Write the exclude list

Name the tasks AI will not touch this year and say why in one line each. Judgement, sensitive data, low volume, poor data.

A written exclude list is what stops the next enthusiastic supplier reopening a closed question.

04

Pick one, and record the baseline

Take the top use case, not the top three. Name one owner. Write down what the task costs today in hours or money, before anything changes.

Choose the single number you will judge it on and put a review date against it.

Actions to turn AI into a return

05

Run the six checks on each candidate

Shortlist two or three tools for the one task, then put each through the six questions on page 5. Reputation on review sites narrows the list. It does not decide the choice.

Trial on your own real work before any money moves.

06

Cost it properly before you sign

Subscription, plus set-up time, plus weekly supervision. Set the total against the loaded cost of the hours it would free, including holidays and management.

The total is usually a small fraction of the loaded cost of the hours it frees, as long as a person stays involved in the work that needs judgement.

07

Pilot on a small, contained part

One query type, one team, one month, with a person checking every output. Keep the scope tight enough to stay in control of it.

Train the people using it openly, and be clear the aim is to remove repetitive work.

08

Measure, then scale or stop

Compare against the baseline you recorded. If the number moved, widen it and start the next use case through the same process.

If it did not, stop. You have learned cheaply. One process done properly beats ten half-finished pilots.

A worked example

A made-up distribution and wholesale business selling to trade customers. Fifteen staff, small teams in operations, sales and finance, one part-time marketer. The figures are invented. The method is the one on page 4.

The scores

Repetitive order and delivery emails	26
First-version marketing copy	25
Quarterly competitor report, new	23
Invoice capture and reconciliation	22
Monthly cross-system reporting	21
Credit and pricing on new accounts	12

What was excluded, and why

Credit and pricing decisions scored 12. Real risk, incomplete data, and a decision that needs a person to own it. Onto the exclude list, with a one-line reason.

What was done

- Baseline:** about 10 hours a week across two people on order and delivery queries, average first reply around four hours.
- Cost:** roughly USD 100 a month for the tool, about AED 367 at the pegged rate of 3.6725. Set-up took 12 to 15 hours, and supervision two to three hours a week at first.
- Pilot:** delivery-status queries only, one owner in operations, a person checking every reply, one written line on what customer data the tool may use.
- After 90 days:** about 8 hours a week freed, first reply on routine queries down to under fifteen minutes. The team moved onto proactive account calls, and the marketing copy use case started its own run.



The one-page AI audit worksheet

Score each task 1 to 5 on every factor, where 5 is the most favourable. Value covers hours saved or value added, Fit means how well it works with your existing systems. Add across for the total out of thirty.

TASK	VOLUME	VALUE	DATA	RISK	FIT	ADOPTION	TOTAL

EXCLUDED THIS YEAR, AND THE ONE-LINE REASON

FIRST USE CASE · OWNER · REVIEW DATE

BASELINE TODAY, AND THE ONE NUMBER IT HAS TO MOVE

Mistakes to avoid and sources to read

Six mistakes I see most often

- ☐ Buying the tool first and looking for a use for it afterwards.
- ☐ Starting three pilots at once, so none of them gets proper attention.
- ☐ No recorded baseline, which makes the renewal decision impossible.
- ☐ No written line on what data may go into a tool, and who signs it off.
- ☐ Scoring the tasks without the people who actually do them.
- ☐ Comparing the subscription price against a salary, rather than the loaded cost of both.

A note on the evidence

The Salesforce figure that 91% of users say AI lifts revenue is self-reported and comes from a survey of its own market, so read it as opinion. The McKinsey profit figures are drawn from large organisations as well as small ones. Both point the same way. The precise numbers will differ in a fifteen-person business.

Sources

McKinsey, The State of AI, 5 November 2025. Salesforce, Small and Medium Business Trends Report, 2025, 3,350 leaders. Greater Manchester Chamber of Commerce, 2025. DFSA AI Survey, 2025, reporting AI use among DIFC regulated firms rising from 33% to 52% in a year. Published list pricing checked August 2026.

Related reading

On ataylorcmo.com, under Insights: the AI audit for SMEs, and AI visibility, how to get your business mentioned by ChatGPT, Gemini and Google AI. Related guides in this series: Get your business mentioned by AI tools, and Measure your marketing, at ataylorcmo.com/guides.



Conclusion

An afternoon in a room, a score out of thirty for every candidate task, a written exclude list, and one use case with an owner and a baseline. That is the whole method.

The businesses that will look back on this period as the one that changed them audited their own operation, picked two or three real problems, and implemented one at a time. Almost none of that is a technology decision.

Next step

I offer a 30 minute discovery call at no charge. Bring your three most repetitive tasks and I will score them with you.

Book at ataylorcmo.com, or write to adam@ataylorcmo.com.



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MSc, FCIM, CDMP. A marketing leader with more than 20 years of international experience driving growth, market expansion and competitive positioning across luxury retail, real estate, free zones, automotive and mega-events.

I work as a fractional chief marketing officer for owners, executives and boards in the UAE, the UK and internationally. My career includes Group Head of Marketing at Emaar, Director of Events and Entertainment at Expo 2020 Dubai, and marketing leadership of a UAE free zone, with more than 5,000 events and activations delivered for premium brands.

Credentials

MSc Marketing. Fellow of the Chartered Institute of Marketing. Certified Digital Marketing Professional.

Experience

More than 20 years across the UAE, the wider Middle East, the UK and global markets.

Specialisms

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Brands and organisations

Emaar · Expo 2020 Dubai · The Dubai Mall · IFZA · Al Tayer Motors · Ferrari · Gucci · Harvey Nichols · Bloomingdale's · Dolce and Gabbana

Contact

If you have a question about this guide, or want a second opinion on where AI belongs in your business, write or call. I reply within one working day.



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