

Small Business AI Stack Checklist

Build the smallest stack that solves your biggest problem.

Choose one workflow. Test its value. Expand only when it works.

Business / owner

Trial dates

01 DEFINE ONE USEFUL JOB

Describe the process before choosing software.

Recurring task or bottleneck

Current time per task / frequency

Target result / quality check

02 CHECK THE TOOL BEFORE YOU ADD IT

Apply the Tool Overload Test™ to each existing or proposed tool.

- ☐ I can name the exact job this tool will do.
- ☐ It is being used, or I have a specific plan to test it.
- ☐ I checked whether another tool already does the job well enough.
- ☐ It fits the rest of the system, including any required connections.
- ☐ Its expected value exceeds setup, subscription, and maintenance costs.

03 PRICE THE WORKFLOW AND PLAN THE TRIAL

Check the current plan, feature access, usage limits, and data settings.

Tool + required plan

Monthly cost + one-time setup cost

- ☐ I included seats, credits, contacts, and integration costs where relevant.
- ☐ I chose suitable sample data and a person to review the output.
- ☐ I defined exceptions, failure checks, and a manual fallback.

04 TEST, MEASURE, AND DECIDE

Week 1: define | Week 2: trial | Week 3: exceptions | Week 4: decide

Measured result, including review and correction time

- ☐ Keep ☐ Adjust ☐ Stop

Time saved is not automatically cash savings or additional profit.