Scaling Readiness Checklist

Know When You're Ready to Add More AI Employees

From: *Hire AI, Not People* by Shawn Kercher | Chapter 15

The Question

You've got your first AI employee running. Now you're wondering: Should I add another one?

This checklist helps you answer that honestly. Scaling too early creates chaos. Scaling at the right time creates momentum.

Part 1: Is Your First AI Employee Stable?

Don't add complexity until the foundation is solid.

Stability Indicators

☐ Running for 30+ days without major issues

☐ Escalation rate is stable (not climbing)

☐ No critical bugs in the last 2 weeks

☐ You're not constantly babysitting it

☐ Team knows how to handle escalations

Quality Indicators

☐ Meeting your target metrics

☐ Customer feedback is neutral or positive

☐

Accuracy rate above 85%

☐

Response time meeting expectations

☐

Knowledge base is comprehensive

Optimization Status

☐

You've done at least 3 improvement cycles

☐

Major gaps in knowledge base are filled

☐

Escalation triggers are well-tuned

☐

Diminishing returns on further tweaks

Score: _____ / 14

Interpretation: - 12-14: Green light to scale - 8-11: Almost ready—address gaps first - Below 8: Focus on current AI employee before adding more

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Part 2: Do You Have a Clear Next Target?

Don't scale for the sake of scaling.

Next AI Employee Clarity

☐

I've identified the next biggest time drain

☐

It's a different workflow than my first AI employee

☐

I can write a clear job description for it

☐

The ROI case makes sense

☐

It's not just "nice to have"

Workflow Readiness

- ☐ The workflow has clear triggers

- ☐ Actions are definable and repeatable

- ☐ I know what success looks like

- ☐ It can share infrastructure with AI employee #1

Score: _____ / 9

Interpretation: - 7-9: Clear target identified - 4-6: Needs more thinking - Below 4: Do the Operations Audit again

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Part 3: Do You Have the Resources?

Scaling requires capacity.

Time Availability

- ☐ I have 5-10 hours/week for the next 4 weeks

- ☐ I'm not in a busy season

- ☐ First AI employee doesn't need constant attention

- ☐ Team can handle escalations while I build

Budget Availability

- ☐ Software costs are within budget

- ☐ If hiring help, budget is approved

- ☐ ROI from first AI employee is proven

- ☐

Not stretching finances thin

Technical Capacity

☐

Current tools can support another AI employee

☐

Data is organized enough to add more workflows

☐

Integrations are stable

☐

No technical debt blocking progress

Score: _____ / 11

Interpretation: - 9-11: Resources are available - 5-8: Some constraints—be realistic - Below 5: Not the right time

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Part 4: Is Your Foundation Solid?

Scaling amplifies whatever exists—good and bad.

Data Layer

☐

CRM is clean and organized

☐

Customer data is accurate

☐

Systems are integrated

☐

No major data silos

Process Documentation

☐

First AI employee has complete documentation

☐

Training document is current

☐

Escalation procedures are clear

☐

Team knows how everything works

Monitoring & Feedback

☐

Measurement system is in place

☐

You review metrics regularly

☐

Feedback loop is working

☐

You catch problems early

Score: _____ / 12

Interpretation: - 10-12: Foundation is solid - 6-9: Some gaps to address - Below 6: Strengthen foundation first

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Final Assessment

Section	Score	Max	Status
Part 1: Stability		14	
Part 2: Target		9	
Part 3: Resources		11	
Part 4: Foundation		12	
TOTAL		**46**	

Scoring Guide

40-46: Scale Now You're ready. The first AI employee is stable, you have a clear target, resources are available, and the foundation is solid. Start your second AI employee.

30-39: Scale Soon Almost there. Address the specific gaps holding you back, then scale. Don't rush—a little more preparation prevents a lot of problems.

20-29: Not Yet Focus on optimizing what you have. Your first AI employee needs more attention, or the conditions aren't right for expansion. Revisit in 30 days.

Below 20: Wait Scaling now will create more problems than it solves. Get your first AI employee running well. Build the foundation. Then revisit this checklist.

Recommended Next AI Employee by Situation

If your first was…	Consider adding…
AI Front Desk	AI Sales Rep (follow-up on those leads)
AI Sales Rep	AI Support Agent (help after the sale)
AI Support Agent	AI Operations Assistant (internal efficiency)
AI Operations Assistant	AI Front Desk (external-facing)
Any	AI Content Creator (if marketing is a gap)

Your Decision

Total Score: _____ / 46

Ready to scale? [ ] Yes [ ] Not yet

Next AI Employee target: _____

Start date: _____

First action: _____

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