

THE AI AUDIT FOR SMEs

Understand, anticipate and leverage artificial intelligence

A guide by **Inovia**

1. Why the AI audit matters for your SME right now

Artificial intelligence is no longer reserved for large corporations. Today, accessible tools allow any business to automate repetitive tasks, improve customer relationships and optimise internal processes. But to get the most out of AI and invest in the right areas, you need to start with a clear diagnosis: that is the purpose of an AI audit.

What is an AI audit?

An **AI audit** is a structured analysis of your business designed to identify where and how artificial intelligence can create value. It evaluates your processes, tools and data to pinpoint concrete improvement opportunities and ensure your use of AI is well managed.

A rapidly changing environment

Artificial intelligence is transforming every industry at an unprecedented pace. Businesses that integrate AI thoughtfully will gain a significant competitive edge: increased productivity, better customer experience, cost optimisation. But adopting AI without a prior diagnosis means risking investment in the wrong areas.

For SMEs, this means concretely: if you use or are considering tools that incorporate AI (chatbots, scoring, recommendation engines...), an audit helps you prioritise the right projects and avoid common pitfalls. It is the starting point for a structured and profitable AI strategy.

Key takeaways

- An AI audit is a diagnostic, not a technical project: it identifies opportunities before you invest.
- AI is evolving rapidly: businesses that get ahead today will be best positioned tomorrow.
- A typical audit takes 2 weeks and requires minimal internal resources.

2. The audit process: step by step

A structured AI audit typically takes two weeks, following a proven three-step process. Here is what happens concretely at each phase.

Step	Duration / When	What happens	Your involvement
Step 1 Discovery	Week 1 3 to 5 interviews of 30–45 min	Interviews with leadership and key team members to understand your processes, tools and friction points.	Make 3 to 5 people available for interviews (via video call or in person).
Step 2 Analysis	Weeks 1–2 Synthesis work	Mapping of your operations, identification of inefficiencies, and evaluation of AI opportunities ranked by impact and feasibility.	One collaborative validation session (1 hour) to confirm priorities.
Step 3 Delivery	End of week 2 Presentation (1 hour)	Delivery of a prioritised roadmap featuring “quick wins” and longer-term projects, along with an estimated return on investment.	Leadership attendance to validate findings and decide on next steps.

Step 1 — Discovery: understanding your reality

The auditor conducts targeted interviews with two types of stakeholders: **leadership** (to understand strategic goals and key performance indicators) and **operational team members** (to capture the day-to-day reality, repetitive tasks and frustrations). The gap between these two perspectives often reveals the greatest opportunities for improvement.

Step 2 — Analysis: mapping and prioritising

The information gathered is translated into a **visual map** of your operations. Each process is analysed to identify friction points: time-consuming tasks, manual data entry, error-prone steps. These points are then plotted on an **opportunity matrix** that cross-references business impact and implementation effort, allowing you to instantly see which AI projects to launch first.

Step 3 — Delivery: your AI roadmap

The audit concludes with an executive presentation that tells a clear story: here is what we learned, here are the opportunities we identified, and here is the recommended plan with estimated return on investment. You leave with an actionable document, not a theoretical report.

Key takeaways

- The effort required from your teams is limited: a few interviews of 30 to 45 minutes.
- The opportunity matrix classifies projects into 4 categories: quick wins, transformative projects, nice-to-haves, and projects to avoid.

3. What is expected from your business and the benefits

Checklist: preparing for your audit

To ensure the audit is effective, here is what you should prepare:

- Identify 3 to 5 key contacts (leadership + operational staff)
- List your current software tools (CRM, ERP, spreadsheets, industry-specific tools...)
- Identify the processes that seem most time-consuming
- Schedule 30 to 45-minute slots for each interviewee
- Designate a main point of contact to coordinate the audit

Concrete benefits for your SME

Benefit	What it means for you
<input checked="" type="checkbox"/> Risk management	You identify precisely how AI is used in your business and ensure those uses are reliable, ethical and well managed.
<input checked="" type="checkbox"/> Time savings	Identification of automatable tasks that free your teams to focus on higher-value work.
<input checked="" type="checkbox"/> Competitive advantage	You adopt AI strategically, ahead of your competitors, with a clear plan.
<input checked="" type="checkbox"/> Customer trust	You demonstrate a responsible and transparent approach to AI usage.
<input checked="" type="checkbox"/> Measurable ROI	Each identified opportunity is quantified in terms of time saved and potential cost reductions.

Real-world example: a 30-employee services company

Imagine an SME in the consulting sector, using a CRM and spreadsheets to manage its clients. The audit reveals that sales reps spend an average of 5 hours per week manually updating the CRM after each client meeting.

The audit identifies a “quick win”: an AI assistant that automatically transcribes meeting notes and updates the CRM. Estimated result: reduced data entry time, fewer errors in the database, and sales reps refocused on client relationships.

This example illustrates how an AI audit transforms a daily frustration into a concrete opportunity, without disrupting the organisation.

4. Risks, frequently asked questions and next steps

Risks of not taking action

Failing to plan for AI integration carries real risks: poorly targeted investments, loss of competitiveness against more agile competitors, and internal disruption caused by ill-suited tools. An AI audit is the first step to avoiding these pitfalls and turning AI into a lever for growth rather than a source of risk.

Key points on risks

- An unstructured approach to AI adoption can lead to hidden costs, operational errors and loss of customer trust.
- Businesses that fail to anticipate risk falling behind strategically, making it harder to catch up.

FAQ: your questions, answered

Question	Answer
How long does an AI audit take?	Approximately 2 weeks, with limited effort on your side (a few hours of interviews).
Is this suitable for a small business?	Yes. The process is designed for businesses with 1 to 50 employees, with 3 to 5 interviews being sufficient.
Do we need to already use AI?	No. The audit is specifically designed to identify opportunities, whether you already use AI or not.
What concrete results can I expect?	A prioritised roadmap with quantified projects (time saved, cost reductions), ready for implementation.
Will my team be heavily involved?	Very little. A few individual interviews of 30 to 45 minutes and one collaborative validation session.

Next steps: how to get started

Want to gain clarity on the potential of AI in your business? Here is how to get started:

To launch your AI audit

1. Get in touch with the Inovia team for a free, no-obligation initial consultation.
2. Identify an internal point of contact who will coordinate interviews and centralise information.
3. Gather the checklist items from the previous page to facilitate the kick-off.

An AI audit is not a burden: it is a strategic investment to make the right decisions at the right time. The sooner you act, the more you turn AI into a growth driver rather than a source of risk.

Artificial intelligence is an opportunity. Inovia is here to help you seize it with confidence.