How to Explain KAI to Your Customers

A plain-language guide to what this app does, what your customers experience, and the exact words you can use to explain it. Section 1 is for talking to prospects. Sections 2–5 are for onboarding your own team. Section 6 answers the questions customers actually ask.

THE ONE-SENTENCE EXPLANATION

"KAI is an AI Readiness system. Your prospect answers five short questions about how their business runs, and gets an instant readiness score. That score tells you exactly how to sell to them — and their details land in your pipeline automatically."

WHAT IT REPLACES

- A generic "contact us" form that tells you nothing about the lead.
- Discovery calls spent asking basic qualifying questions you could have collected up front.
- A spreadsheet of leads with no scoring, no stage and no notes.

SECTION 01

Explaining it to a prospect

Three framings, depending on who you are talking to. Use the one that fits.

If they care about time saved

TALK TRACK

"Most businesses know AI could help but have no idea where to start — or whether they are even ready. Our quiz takes about ninety seconds and gives you an honest answer: ready now, ready with guidance, or foundations first. No sales pitch until you have your score."

If they care about the outcome

TALK TRACK

"The score is not a gimmick — it maps to what we would actually do with you. Score high and we automate one high-volume workflow end to end. Score in the middle and we tidy your data and processes as we automate them. Score low and we map your processes first, because AI would otherwise just amplify the chaos."

If they are cautious about sharing details

TALK TRACK

"You answer the five questions first. We only ask for your name and email at the end, so your score is tied to a real person we can follow up with. Business name is optional."

DO AND DO NOT

- Do call it an assessment or a readiness check — it earns a reply better than “quiz”.
- Do be upfront that the score arrives after they enter their details. Surprise gates cause drop-off; a promised one does not.
- Do reference their actual answers on the follow-up call. It proves you read them.
- Do not promise the score is a formal audit — it is a five-question directional read.
- Do not describe a “Not Ready” result as a rejection. It is the start of a different conversation, not the end of one.

SECTION 02

What your customer actually experiences

The full journey, in order, exactly as it appears on screen.

Step	What they see	What you should tell them
1 · Landing	The KAI intro screen with a single “Start the quiz” button.	“It is five questions, about ninety seconds.”
2 · Questions	Five questions, one at a time. Three options each — no typing.	“Answer honestly, not aspirationally. A low score is more useful than a flattering one.”
3 · Details	Full name and email required; business name optional.	“This is where we ask who you are, so we can send the follow-up.”
4 · Submit	A button reading “See My AI Readiness Score”.	“Your score appears the moment you submit.”
5 · Result	Score out of 10, their tier, tailored guidance, and their own answers listed back.	“Screenshot it — we will work from this on our call.”

The five questions

Each question is worth 0, 1 or 2 points, for a maximum of 10. Knowing the scoring lets you predict a prospect's tier during a conversation, before they ever take the quiz.

Question	2 points	1 point	0 points
How well documented are your core business processes?	Written down and followed	Partly documented	It all lives in our heads
How often does your team use AI tools today?	Daily, in real workflows	Occasionally, for drafts	Not at all
Where does your customer data live?	One central system	A few tools synced manually	Spreadsheets, inboxes, notebooks
How many hours a week go to repetitive admin?	Under 5 — lean	5 to 15 hours	More than 15 hours
Who would own an AI rollout internally?	A named person with time	Someone, between other work	Nobody yet

The three score tiers

Score	Tier	What the customer is told	How you should follow up
8–10	Ready	“You're ready to deploy.” Foundations are solid; automate one high-volume workflow end to end, then layer AI on top.	Move fast. Book a scoping call, not an education call.
4–7	Guided	“You're ready with guidance.” The appetite is there but the plumbing needs work; a guided rollout tidies data and processes as it automates them.	Your core market. Lead with the diagnostic.
0–3	Not Ready	“Foundations first.” AI would amplify the chaos; start by mapping and documenting core processes.	Nurture. Offer process mapping as the first paid step.

Nothing is revealed before submission — the score is calculated only once the customer has given their details, so every score you see has a real contact attached to it.

SECTION 03

What your team sees: the Prospect Pipeline

Every completed quiz becomes a card on the dashboard. Team members sign in with email and password or with Google.

Reading the dashboard

- Three stats across the top — total prospects, how many scored in the Ready tier, and the average score. This is your health check at a glance.
- Cards grouped by stage. Each card shows initials, name, business or email, score, tier and submission date. A “· noted” marker means someone has already added diagnostic notes.
- Sync leads refreshes the board to pull in anything submitted since you opened it.
- Click any card to open that lead's own detail page.

The six pipeline stages

Every lead starts at New Lead and moves rightward. Agree internally on what earns a move — a shared definition is what makes the board trustworthy.

Stage	What it means	What has to happen to move on
New Lead	Quiz completed, nobody has reached out yet.	Someone makes first contact.
Contacted	You have reached out; no reply or no meeting yet.	They agree to a diagnostic conversation.
Diagnostic	You are actively assessing their processes and data.	You have enough to scope and price the work.
Proposal	A proposal or quote is with them.	They accept.
Onboarding	Accepted, and you are setting them up.	They are live and running.
Won	Live customer.	—

SECTION 04

The lead detail page

Everything about one prospect on a single screen. This is where the real work happens.

What is on it	What it is for
Header and tier badge	Name, business, email, score and tier — the context you need before you dial.
Full quiz answers	Every question with the option they chose. Quote these back on the call: “you mentioned nobody owns an AI rollout yet.”
Diagnostic notes	A free-text field you edit and save. Use it for what the score cannot capture — budget, timing, who the decision maker is, objections raised.
Stage controls	Move the lead through the pipeline. Every move is recorded automatically.
Activity timeline	A dated history of the lead: quiz submitted, each stage change, each note update. Nothing is lost when someone hands a lead over.

HOW TO EXPLAIN THE TIMELINE TO A TEAM MEMBER

“You never have to ask what happened with a lead. The timeline shows when they took the quiz, every stage they moved through and when, and every time someone updated the notes. If you pick up a lead a colleague started, the whole history is right there.”

SECTION 05

A working routine you can hand to your team

Simple, repeatable habits that keep the pipeline honest.

When	Do this
Daily	Open the dashboard, work the New Lead column first, contact every Ready-tier lead the same day it arrives.
After every conversation	Open the lead's detail page, update the notes, move the stage. Two minutes, every time — this is the whole discipline.
Weekly	Scan the average score stat. A falling average usually means your traffic source changed, not that the market did.
Monthly	Review leads stuck in one stage. Anything sitting in Contacted for weeks needs a different approach or an honest close-out.

THE ONE RULE THAT MATTERS

If the stage on the board does not match reality, the board is worse than useless — it is misleading. Update the stage as you go, not at the end of the week from memory.

SECTION 06

Questions customers ask, and how to answer

Word-for-word answers you can reuse.

They ask	You say
“How long does this take?”	“About ninety seconds. Five questions, three options each, no typing.”
“Why do you need my email?”	“So your score is attached to a real person and we can send the follow-up. You answer the questions first — we only ask at the end.”
“What if I score badly?”	“Then you have learned something useful for free. A low score is not a rejection — it tells us to start with process mapping instead of automation, which is cheaper and faster than getting it the wrong way round.”
“Is the score a real assessment?”	“It is a directional read, not a formal audit. It is accurate enough to decide what our first conversation should be about.”
“Can I retake it?”	“Yes — there is a retake option on the results screen. Worth doing after you have made changes, to see the score move.”
“What happens after I submit?”	“Your score appears immediately, and you land in our pipeline. Someone from the team follows up, and they will already have read your answers.”
“Who sees my answers?”	“Only our team. You need to be signed in to view any prospect information — nothing is public.”

THE PAGES IN THE APP

- Home — the public AI Readiness Quiz. This is the link you send to prospects.
- Setup guide — the in-app walkthrough of how the quiz-to-pipeline flow works.
- Sign in — team access, by email and password or Google.
- Dashboard — the Prospect Pipeline. Team only.
- Lead detail — one page per prospect, reached by clicking any card. Team only.

Send customers the home page link only. Everything else is for your team and requires a sign-in.