

27-POINT CHECKLIST

The SMB Automation Audit

Find the hours your business is losing to manual work. Check every box that describes your business today — each one is a task that can run itself.

How to use this: Go section by section with whoever does the work. Check the box if it's done manually today. Note the hours per week beside each. At the end, add them up — that's your automation opportunity.

01 Email & Follow-ups

The silent time drain — most businesses find 4-6 hours here.

WE MANUALLY...	TYPICAL COST
☐ Send confirmation emails after a purchase, booking, or inquiry	1-2 hrs/wk
☐ Write welcome emails to every new client	1 hr/wk
☐ Follow up on quotes and proposals (or forget to)	1-2 hrs/wk
☐ Notify team members when something needs their attention	1 hr/wk
☐ Answer the same 5 questions over and over by email	1-3 hrs/wk

02 Invoicing & Payments

Where automation pays for itself fastest — literally.

WE MANUALLY...	TYPICAL COST
☐ Create invoices one at a time from completed work	1-2 hrs/wk
☐ Chase late payments with awkward reminder emails	1-2 hrs/wk
☐ Reconcile payments against invoices by hand	1 hr/wk
☐ Track who's paid and who hasn't in a spreadsheet	30 min/wk

WE MANUALLY...

TYPICAL COST

- | | |
|---|----------|
| ☐ Wait 30+ days on average to get paid | cashflow |
|---|----------|

03 Scheduling & Appointments

Every back-and-forth email is a chance for the lead to go cold.

WE MANUALLY...

TYPICAL COST

- | | |
|--|------------|
| ☐ Go back and forth by email to find a meeting time | 1-2 hrs/wk |
| ☐ Send appointment reminders (or suffer no-shows) | 30 min/wk |
| ☐ Handle reschedules and cancellations by hand | 30 min/wk |
| ☐ Copy bookings into the calendar from another system | 30 min/wk |

04 Data Entry & Reporting

If someone copies data from one tool to another, check the box.

WE MANUALLY...

TYPICAL COST

- | | |
|--|------------|
| ☐ Copy-paste information between two or more tools | 2-4 hrs/wk |
| ☐ Build weekly/monthly reports in spreadsheets | 1-3 hrs/wk |
| ☐ Update inventory, price lists, or catalogs by hand | 1-2 hrs/wk |
| ☐ Enter leads from web forms into a CRM or spreadsheet | 1 hr/wk |
| ☐ Not really know our numbers until someone compiles them | visibility |

05 Client Onboarding

First impressions, made by hand, under time pressure.

WE MANUALLY...

TYPICAL COST

- | | |
|---|---------------|
| ☐ Send contracts and chase signatures | 30 min/client |
| ☐ Create folders, accounts, and access for each new client | 30 min/client |

WE MANUALLY...

TYPICAL COST

- | | |
|---|---------------|
| ☐ Send the same kickoff information to every new client | 30 min/client |
| ☐ Collect the same intake information by email, repeatedly | 30 min/client |

06 Internal Operations

The invisible work that never makes it to a to-do list.

WE MANUALLY...

TYPICAL COST

- | | |
|---|-----------|
| ☐ Assign and track recurring tasks (and things slip) | 1 hr/wk |
| ☐ Post the same updates in multiple places (chat, email, docs) | 30 min/wk |
| ☐ Back up files or export data on a schedule someone must remember | 30 min/wk |
| ☐ Re-type information into payroll, accounting, or HR tools | 1 hr/wk |

Your score

Count your checked boxes and add up the hours column.

0–8 checks

Tight ship. Automate your top 2–3 items and you're ahead of 90% of SMBs.

9–17 checks

Typical – and expensive. You're likely losing 10–15 hrs/week. Prioritize sections 01–02 first.

18–27 checks

Your team is doing robot work. 15–20+ hrs/week recoverable. Start with the section that hurts most.

Want us to run this audit with you – free?

Book a free 30-minute discovery call. We'll go through your checks together and map exactly what to automate first. No pitch, no jargon – you leave with a plan either way.

[Book a free call →](#)