THE CHECKLIST

# The SMB AI Automation Checklist

40 workflows worth automating, and how to decide which one first.

PREPARED BY
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FORMAT
6 sections, 40 workflows, 1 framework

# Find your workflow

Most of the time a small business loses isn't spent on hard problems. It's spent on repetitive, rules-based, high-volume tasks: the same intake step, the same reply, the same re-typing of a number from one system into another. That is exactly the kind of work an AI agent handles well. Read through the list below, section by section, and check off anything that happens in your business at least once a week. By the end you'll have a shortlist, and the next page shows you how to pick the first one to fix.

## 1 Client and customer operations

- [ ] **Onboarding sequences** triggered automatically when a new client signs
- [ ] **Intake forms routed to CRM** without manual re-entry
- [ ] **Appointment scheduling** and confirmation handled without back and forth emails
- [ ] **Reminder messages** sent ahead of appointments or deadlines
- [ ] **Status update messages** sent at each stage of a job or case
- [ ] **Review requests** sent automatically after a job closes
- [ ] **Offboarding steps** triggered when a client or project ends

## 2 Documents and data

- [ ] **Sorting and classifying uploads** as they land in a shared inbox or folder
- [ ] **Extracting fields** from forms, invoices, or receipts into usable data
- [ ] **Re-keying data** between two systems that don't talk to each other
- [ ] **File naming and filing** into the right client or project folder
- [ ] **Data validation**, flagging missing fields or obvious errors before they move on
- [ ] **Duplicate detection** across records or submissions
- [ ] **Document version tracking** so the latest copy is always the one in use

# The rest of the list

## 3 Communications

- ☐ **Routine reply drafting** pulled from your own docs and past answers
- ☐ **Inbound email triage**, sorting and routing to the right person or queue
- ☐ **Follow-up sequences** that fire when a thread goes quiet
- ☐ **FAQ answers** handled instantly instead of queued for a human
- ☐ **Meeting notes and summaries** generated and distributed automatically
- ☐ **Internal announcement drafts** for team-wide updates

## 4 Finance and billing

- ☐ **Invoice generation** from completed work or logged hours
- ☐ **Past-due follow-up** sent on a set schedule without a person remembering to
- ☐ **Expense categorization** as transactions come in
- ☐ **Reconciliation prep**, matching transactions to records before review
- ☐ **Payment reminders** sent ahead of and at the due date

## 5 Sales and lead handling

- ☐ **Lead capture and enrichment** from forms, calls, or chat
- ☐ **Qualification and scoring** applied consistently to every lead
- ☐ **Routing hot leads** to the right rep the moment they qualify
- ☐ **Personalized follow-up** sent without a rep writing it by hand each time
- ☐ **Booking qualified prospects** directly onto a calendar
- ☐ **Pipeline updates** kept current without manual CRM entry

## 6 Internal operations and reporting

- ☐ **Recurring reports** assembled and sent on schedule
- ☐ **Dashboard updates** pulled from source systems automatically
- ☐ **Inventory or capacity checks** run and flagged without a manual count
- ☐ **Task handoffs** between team members or shifts
- ☐ **Compliance reminders** for renewals, filings, and deadlines
- ☐ **Vendor and supply reordering** triggered at set thresholds

# How to pick the first one

You probably checked more boxes than you can fix at once. Good. Now score your top candidates on three simple axes and start with the one that scores highest overall. Don't overthink the scoring, a rough 1 to 5 gut check per axis is enough to sort your list.

AXIS 01

### Time it eats

Roughly how many hours a week does this workflow cost someone on your team, start to finish. Score 1 (under an hour) to 5 (a half day or more).

AXIS 02

### How often it happens

Does this come up once a month or many times a day. Score 1 (rare) to 5 (constant, every day, multiple times).

AXIS 03

### How manual and rules based it is

Does this follow the same steps every time with little judgment involved. Score 1 (needs real judgment) to 5 (pure repetition, same rules every time).

| CANDIDATE WORKFLOW | TIME (1 TO 5) | FREQUENCY (1 TO 5) | MANUAL / RULES (1 TO 5) | TOTAL |
|---|---|---|---|---|
| Example: past-due invoice follow-up | 3 | 4 | 5 | 12 |
| | | | | |
| | | | | |
| | | | | |
| Highest total wins, that's your first build | | | | |

### Why start with the highest score, not the biggest idea

The workflow with the highest combined score is the one costing you the most for the least judgment required, which means it's the safest place to hand off to an agent and the fastest place to see time back. Ambitious automations across many systems are worth doing eventually, but they take longer to build and longer to trust. Win small first, then expand.

If two candidates tie, pick the one that touches customers least directly. Internal reporting and back-office workflows are lower risk to automate first than anything client-facing, and a clean early win builds the case for tackling the bigger ones next.

# When it's worth bringing in help

Plenty of workflows on this list can be wired up in an afternoon with tools you already have. Others are worth a second look before you commit hours to building them yourself.

- The workflow touches more than two systems (your CRM, your inbox, your invoicing tool, your calendar) and keeping them in sync by hand is where the real time is going.
- You've tried a template or off-the-shelf automation tool and it broke the moment a real-world exception showed up.
- The workflow is client-facing, so a mistake is visible and costly, and you want it built and tested properly before it goes live.
- You know which workflow to fix from this checklist, but nobody on your team has the time to actually build and maintain it.
- You want the automation to be yours, running on your accounts and your data, not locked inside someone else's platform.

NEXT STEP

## Agent Setup builds and installs these as systems you own outright.

We take the workflow you scored highest and build it as a working agent inside your own tools and accounts, not a rented subscription. You keep it, you can change it, and it keeps running after we're done.

BOOK A DISCOVERY CALL
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