

The 25-Point AI Automation Checklist for Small Businesses

Tick every box that sounds like your business. The ones you check are exactly where AI could be saving you hours and catching leads you're losing right now. Your total at the end tells you how ready you are — and what to fix first.



Sales & leads

speed wins deals

- ☐ Leads sometimes wait **hours** for a reply because you're busy or it's after hours.
- ☐ You don't reliably follow up more than once with an inquiry that goes quiet.
- ☐ You're not sure which leads are actually worth your time until you've spent it.
- ☐ Quotes or proposals take a while to get out the door.
- ☐ You suspect you're losing deals to whoever replies first.
- ☐ New inquiries come in through several places (site, Google, social) and it's hard to keep up.



Customer experience

answer everyone

- ☐ You answer the **same questions** (hours, pricing, availability) over and over.
- ☐ Calls go to voicemail when you're busy — and most callers don't leave one.
- ☐ After-hours messages sit unanswered until the next business day.
- ☐ Google/Yelp reviews go without a response, or pile up.
- ☐ Happy customers rarely leave a review because no one asks at the right moment.
- ☐ You'd need to hire someone just to keep up with customer questions.



Operations & back-office

kill the admin

- ☐ You reconcile inventory or stock **by hand** across channels, or worry about overselling.
- ☐ Invoices go out late, or you chase payments manually.
- ☐ Hours disappear into copy-paste data entry and repetitive admin.
- ☐ Your team interrupts each other for the same answers (policies, SOPs, how-tos).
- ☐ Scheduling and email management eat into time you'd rather spend elsewhere.
- ☐ Admin work grows every time the business does — and it's capping your growth.



- ☐ Your social posting goes **quiet** for weeks whenever you get busy.
- ☐ Your blog or website content rarely gets updated.
- ☐ You're not showing up for the local searches your customers actually type.
- ☐ Creating content for multiple platforms feels like too much work to keep up.
- ☐ Your Google Business Profile is neglected or out of date.
- ☐ You know marketing matters but it's always the thing that happens "later."
- ☐ **Bonus:** you're considering a hire mainly to handle repetitive, rules-based work.

Add up your checkmarks

Every box you ticked is a task AI could take off your plate. Here's a rough read on where you stand:

1–6 checks

Quick wins

A couple of targeted automations would free up real time fast. Start with your most-checked section.

7–14 checks

High leverage

You're leaving hours and leads on the table weekly. A focused system pays for itself quickly.

15+ checks

Growth-capped

Busywork is limiting how big you can get. Automation is the fastest way to unlock capacity.

Want a plan for **your** top boxes?

Book a free 30-minute AI audit. We'll map exactly which of these to automate first and what it's worth in hours and dollars — you'll leave with a clear plan whether or not you hire us.

[Book your free AI audit →](#)

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