



The Small Business Automation Checklist

Every box you **can't** tick is time or money leaking out of your business. Go through the six areas below and check off everything that already runs automatically. Then add up your score at the end — it'll tell you exactly where automation would pay off fastest.

1 Lead Response

- ☐ Every new inquiry gets a reply within 5 minutes — automatically, even after hours
- ☐ Leads that don't book get a follow-up sequence (not a one-and-done email)
- ☐ Every lead is logged in one place, no matter which channel it came from

2 Reviews & Reputation

- ☐ A review request goes out automatically after every completed job
- ☐ Customers who don't leave one get a gentle reminder a few days later
- ☐ You're alerted the moment a new review is posted — especially negative ones

3 Scheduling & Appointments

- ☐ Customers get an instant confirmation when they book
- ☐ Reminders go out 24 hours and 1 hour before the appointment
- ☐ No-shows automatically get a rebooking prompt

4 Invoicing & Payments

- ☐ Invoices are generated and sent automatically when a job is done
- ☐ Overdue invoices trigger escalating reminders (7 / 14 / 30 days) without you chasing
- ☐ Paid invoices send an automatic receipt

5 Customer Communication

- ☐ Key events (job booked, completed, etc.) trigger the right email automatically
- ☐ New customers get a welcome sequence
- ☐ Dormant customers get a re-engagement nudge

6 Reporting & Admin

- ☐ A weekly summary (leads, jobs, revenue) lands in your inbox automatically
- ☐ Your tools talk to each other — no copy-pasting data between apps
- ☐ The same repetitive task isn't done by hand more than once a week

Add up your score — how many did you tick?

14–18: You're running a tight ship. A few targeted automations would put you fully hands-off.

7–13: You're leaking hours every week. The gaps above are costing you leads, reviews, and late payments.

0–6: Most of your day is manual work a system could handle in seconds. This is where automation pays for itself fastest.

Want to know exactly what to automate first?

Book a free 15-minute audit. We'll look at your business and show you the 2–3 highest-impact automations — no pitch, no obligation.

ambuilder.ca/book