

NO CAPSAI — FREE AI AUDIT CHECKLIST

Tagline: Your business, but 10X faster and 90% less manual.

1) Process Mapping

- List top 3 repetitive tasks per team
- Identify inputs, outputs, and approvals

2) Tools & Data

- Current tools (CRM, email, spreadsheets)
- Where data lives (files, forms, databases)
- Access & permissions

3) Quick Wins (Ship This Week)

- Email triage rules and canned replies
- Auto route leads and follow-ups
- Generate weekly reports automatically

4) Guardrails

- SOPs for each automation
- Owner & fallback for each flow
- Logging and error notifications

5) Success Metrics

- Time saved per task
- Tasks automated per week
- SLA for response/turnaround

Why crawl when you can fly? — nocapsai.com