

The 10-Point Automation Audit

Find 10+ Hours of Hidden Time in Your Business

Time to complete: 15 minutes

What you'll need: Just your brain and honesty

Go through each question. Be honest about how much time you're actually spending. The goal isn't to automate everything—it's to find the tasks where automation gives you the biggest return.

1. Data Entry & Copy-Pasting

Ask yourself: How often do I (or my team) copy information from one place to another?

- Copying form submissions into a spreadsheet or CRM
- Re-typing customer info from emails into your system
- Moving data between apps that don't talk to each other

Estimate your weekly time: _____ hours

→ *If you're spending more than 30 minutes/week on this, it should be automated. Most data entry can be eliminated completely.*

2. Lead Follow-Up

Ask yourself: What happens when a new lead comes in?

- Do you manually send the first email?
- Do leads ever slip through the cracks?
- How long does it take you to respond?

Estimate your weekly time: _____ hours

→ *First response should be instant and automatic. Follow-up sequences should run without you thinking about them.*

3. Invoicing & Payment Collection

Ask yourself: How much manual work goes into getting paid?

- Creating invoices from scratch each time
- Sending payment reminders manually
- Chasing down late payments

Estimate your weekly time: _____ hours

→ *Invoices can generate automatically. Reminders can send themselves. Payment reconciliation can sync automatically.*

4. Scheduling & Calendar Management

Ask yourself: How do you book calls and meetings?

- Back-and-forth emails to find a time?
- Manually sending confirmation and reminder emails?
- No-shows because people forgot?

Estimate your weekly time: _____ hours

→ *This should be fully automated. Automated reminders cut no-shows by 50%+.*

5. Client Onboarding

Ask yourself: What happens after someone says 'yes'?

- Do you send the same emails/docs manually each time?
- Do you create accounts or folders by hand?
- Is there a checklist that's mostly the same?

Estimate your weekly time: _____ hours

→ *Onboarding sequences can trigger automatically. Welcome emails, contracts, folder creation—all without you.*

6. Reporting & Status Updates

Ask yourself: How do you track and report on your work?

- Pulling data from multiple sources into one report?
- Manually creating weekly/monthly summaries?
- Sending the same status update emails repeatedly?

Estimate your weekly time: _____ hours

→ *I've seen businesses cut reporting from 4 hours to 15 minutes with a single automation.*

7. Social Media & Content

Ask yourself: How much time goes into your online presence?

- Manually posting to multiple platforms?
- Formatting content differently for each channel?
- Forgetting to post because it's not scheduled?

Estimate your weekly time: _____ hours

→ *One piece of content can automatically distribute to multiple platforms.*

8. Customer Communication

Ask yourself: What repetitive messages do you send?

- Order confirmations?
- Shipping updates?
- Appointment reminders?
- FAQ responses?

Estimate your weekly time: _____ hours

→ *If you're typing the same message more than twice, it should be a template or fully automated.*

9. File Organization

Ask yourself: How organized is your digital workspace?

- Searching for files you know exist somewhere?
- Manually creating folders for each project?
- Renaming and moving files by hand?

Estimate your weekly time: _____ hours

→ *Folder structures can auto-generate. Files can auto-sort based on rules.*

10. Internal Handoffs

Ask yourself: How does work move between people?

- Manually notifying someone when a task is ready?
- Status updates requiring checking multiple places?
- Things falling through cracks during handoffs?

Estimate your weekly time: _____ hours

→ *Handoff notifications can be automatic. Nothing should require 'hey, this is ready' messages.*

Add It Up

Category	Hours/Week
1. Data Entry	
2. Lead Follow-Up	
3. Invoicing	
4. Scheduling	
5. Client Onboarding	
6. Reporting	
7. Social Media	
8. Customer Communication	
9. File Organization	
10. Internal Handoffs	
TOTAL	

What Your Score Means

0-3 hours/week: You're in good shape. Focus on the highest-impact area.

4-10 hours/week: You're losing half a workday or more. Start with your top 2-3 time drains.

10+ hours/week: This is costing you serious money. At \$50/hour, 10 hours = \$2,000/month walking out the door.

What to Automate First

Start with tasks that are:

- **Repetitive** — You do them the same way every time
- **Frequent** — They happen daily or weekly, not once a year
- **Rule-based** — There's a clear 'if this, then that' logic
- **Low-risk** — Mistakes are fixable, not catastrophic

The 5-Minute Automation Test

For any task, ask:

1. Could I write step-by-step instructions for someone else to do this?
2. Does this involve moving information between two systems?
3. Do I do this more than once a week?
4. Would a mistake here be annoying or catastrophic?

If you answered 'yes' to 3+ of these, that task is a strong automation candidate.

Need Help Implementing?

I build automation systems for businesses like yours. If you found 10+ hours of hidden time and want help getting it back, let's talk.

Reply to this email with your biggest time-waster.

I'll tell you if it's automatable and roughly what it would take.

— Seth Forte

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P.S. — Most of my clients see ROI within 4-8 weeks. The automation pays for itself, then keeps paying you back in time.