PRISM AI

SMB Automation Audit Checklist

Identify what to automate first — and stop leaking time and revenue

This checklist helps you map your current workflows, identify the biggest automation opportunities, and prioritise what to fix first. Work through each section honestly. The more boxes you tick, the more time and money you're leaving on the table.

Score guide: **0–10 boxes checked** = strong foundation · **11–20** = moderate opportunity · **21+** = significant automation ROI available

SECTION 1: LEAD CAPTURE & RESPONSE

■ New leads are entered manually into your CRM

■ *Every manual entry = delay + errors*

■ Lead source is not automatically tracked

■ First response to a new lead takes more than 1 hour

■ *Speed to lead = conversion rate*

■ Follow-up reminders are set manually

■ No automated acknowledgement email/SMS on lead submission

■ Leads from different sources (web, phone, referral) land in different places

■ You rely on memory or sticky notes to track follow-ups

SECTION 2: SALES PIPELINE & FOLLOW-UP

■ Pipeline stages are updated manually after each interaction

■ No automated follow-up sequence after initial contact

■ *Most deals close on follow-up 5–8*

■ Proposals/quotes are built from scratch each time

■ No automated reminder when a deal goes cold (no activity 3+ days)

■ Win/loss data is not tracked or analysed automatically

■ Onboarding a new client requires manual steps each time

SECTION 3: OPERATIONS & INTERNAL WORKFLOWS

■ Team task assignment happens via WhatsApp/email/verbal

■ Weekly reports are built manually

■ *If it takes >30 min, automate it*

■ Invoices are created and sent manually

■ No automated payment reminders for overdue invoices

■ Staff onboarding has no documented automated checklist
■ Recurring tasks (weekly/monthly) are not automated or templated
■ Data is copied between systems manually (e.g. CRM → spreadsheet)

SECTION 4: CUSTOMER COMMUNICATION

■ No automated appointment reminders to clients
■ *Reduces no-shows by up to 80%*
■ Post-service follow-up is manual or doesn't happen
■ No automated review/testimonial request after job completion
■ Client status updates require manual messages
■ FAQ responses are written from scratch each time
■ No chatbot or AI handling after-hours enquiries

SECTION 5: REPORTING & ANALYTICS

■ Revenue/pipeline reports require manual data pulls
■ No dashboard showing real-time lead-to-close metrics
■ Marketing spend vs revenue attribution is not tracked automatically
■ Team performance data requires manual compilation
■ No automated alert when a KPI drops below threshold

MY SCORE	PRIORITY AUTOMATION	ESTIMATED TIME SAVED/WEEK
______ / 31	______________________________	______________________________

Want us to do this audit for you?
We'll map your workflows, identify your top 3 automation wins, and give you a prioritised implementation plan — free 30-minute session.
Book at: prismaiservices.netlify.app