AYOTHEDOC

Agency ops automation

The 40-Hour Automation Audit Checklist

27 checkpoints to find the hidden time-wasters costing your agency $26,000+/year

How to use this checklist: Go through each category and check off items that are already automated in your business. Unchecked items represent automation opportunities. For each unchecked item, estimate how many hours per week your team spends on it manually. The total is your recoverable time.

Scoring Guide

0–5 unchecked = You're well-automated. Focus on optimization.
6–15 unchecked = Significant savings available. Start with quick wins.
16–27 unchecked = Major opportunity. An Ops Sprint would transform your operations.

1. Lead & Sales Pipeline

- [ ] Lead capture and routing — are new leads automatically added to your CRM?
- [ ] Follow-up sequences — do leads get instant email/SMS follow-ups?
- [ ] CRM data entry — is contact info manually copied between tools?
- [ ] Quote/proposal generation — are proposals created from templates automatically?

2. Customer Onboarding

- [ ] Welcome sequences — do new clients get an automated onboarding email series?
- [ ] Account setup — are projects/accounts created automatically after payment?
- [ ] Document collection — are contracts, NDAs, and briefs collected via automated forms?

3. Order Processing

- [ ] Order confirmation — do customers get instant confirmation emails?
- [ ] Inventory updates — does stock sync automatically across platforms?
- [ ] Shipping notifications — are tracking updates sent without manual input?
- [ ] Invoice generation — are invoices created and sent automatically?

4. Internal Communication

- [ ] Status updates — does your team get auto-notified when tasks change status?
- [ ] Meeting scheduling — are meetings booked without back-and-forth emails?
- [ ] Task assignments — are tasks auto-created and assigned from intake forms?

5. Reporting & Analytics

- [ ] Daily/weekly reports — are reports generated and sent automatically?
- [ ] Dashboard updates — do dashboards pull live data without manual refresh?
- [ ] KPI tracking — are key metrics tracked and alerted on automatically?
- [ ] Data consolidation — is data from multiple tools combined without spreadsheets?

6. Customer Support

- [ ] Ticket routing — are support requests auto-assigned to the right person?
- [ ] FAQ responses — do common questions get instant auto-replies?
- [ ] Escalation workflows — are urgent issues flagged and escalated automatically?

7. Financial Operations

- [ ] Invoice processing — are incoming invoices captured and categorized automatically?
- [ ] Expense tracking — do expenses sync from cards/tools without manual entry?
- [ ] Payment reminders — are overdue payment follow-ups sent automatically?

8. HR & Team Management

- [ ] Time tracking — is time logged automatically or prompted by task changes?
- [ ] Leave requests — are PTO requests handled via an automated workflow?
- [ ] Onboarding checklists — do new hires get auto-assigned setup tasks?

Your Results

Total unchecked items: ______ / 27

Estimated hours wasted per week: ______ hrs

Estimated annual cost ($50/hr): $______

Top 3 categories to automate first: