

THE ULTIMATE AI AUTOMATION CHECKLIST

50+ Tasks Every Business
Should Automate

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HOW TO USE THIS CHECKLIST

Step 1: Review each category

Step 2: Check off tasks you're already doing

Step 3: Highlight tasks you should automate

Step 4: Prioritize by ROI (marked with 💰 symbols)

Step 5: Start with "Quick Win" tasks (marked with ⚡)

Legend:

- ⚡ = Quick Win (*Easy to implement, high impact*)
- 💰 = High ROI (>300% return in year 1)
- 💰💰 = Very High ROI (>500% return in year 1)
- 💰💰💰 = Exceptional ROI (>1000% return in year 1)
- 🤖 = AI-Powered (*Uses AI/ML technology*)
- 🔧 = Technical (*May need developer*)

YOUR AUTOMATION SCORECARD

Instructions: Check off what you've already automated, then calculate your score.

Tasks Already Automated: ___ / 50 = ___ %

Automation Maturity Level:

- 0-20%: Beginner (*Huge opportunity!*)
- 21-40%: Getting Started (*On the right track*)
- 41-60%: Intermediate (*Good progress*)
- 61-80%: Advanced (*You're doing great!*)
- 81-100%: Expert (*Teach us your ways!*)



SECTION 1

LEAD GENERATION & SALES

CAPTURE, QUALIFY, AND CONVERT LEADS AUTOMATICALLY

Lead Capture (5 tasks)

- 1. Website Form to CRM ⚡💰💰💰
 - *What: Automatically send website inquiries to your CRM*
 - *Why: Never lose a lead, instant follow-up*
 - *Difficulty: Easy*
 - *Time Saved: 5-10 hrs/week*
 - *Tools: Zapier, Make, native integrations*
 - *ROI: 1000%+ (prevents lost revenue)*
- 2. Social Media Lead Capture ⚡💰💰
 - *What: Automatically capture leads from Facebook/Instagram ads*
 - *Why: Speed matters - respond in 5 min vs 5 hours*
 - *Difficulty: Easy*
 - *Time Saved: 3-5 hrs/week*
- 3. Landing Page to Email List ⚡💰
 - *What: Auto-add downloads/signups to email marketing*
 - *Why: Build your list automatically*
 - *Difficulty: Easy*
 - *Time Saved: 2-3 hrs/week*
 - *Tools: Email platform API integration*
- 4. Chat Widget Lead Routing 💰
 - *What: Route chat conversations to the right team member*
 - *Why: Faster response, better experience*
 - *Difficulty: Medium*
 - *Time Saved: 4-6 hrs/week*
 - *Tools: Intercom, Drift, or custom chatbot*

- 5. Event Registration to CRM 💰
 - What: Automatically add webinar/event registrants to CRM
 - Why: Follow up while interest is hot
 - Difficulty: Easy
 - Time Saved: 2-4 hrs/week
 - Tools: Zoom, Eventbrite → CRM integration

Lead Qualification (3 tasks)

- 6. Lead Scoring Automation 💰🤖
 - What: Automatically score leads based on behavior/demographics
 - Why: Focus on highest-value prospects
 - Difficulty: Medium
 - Time Saved: 5-8 hrs/week
 - Tools: HubSpot, Salesforce, or custom rules
- 7. Lead Enrichment 💰🤖
 - What: Automatically pull company data from LinkedIn, etc.
 - Why: Better context for sales conversations
 - Difficulty: Medium
 - Time Saved: 3-5 hrs/week
 - Tools: Clearbit, ZoomInfo, Apollo
- 8. Lead Assignment Rules ⚡💰💰
 - What: Auto-assign leads to sales reps by territory/criteria
 - Why: Instant routing, no manual sorting
 - Difficulty: Easy
 - Time Saved: 2-4 hrs/week
 - Tools: CRM routing rules

Follow-Up & Nurture (4 tasks)

- 9. Email Follow-Up Sequences ⚡💰💰💰
 - What: Automated email drip campaigns
 - Why: Never forget to follow up
 - Difficulty: Easy
 - Time Saved: 10-15 hrs/week
 - Tools: Mailchimp, HubSpot, Active Campaign

□ 10. Meeting Scheduling ⚡💰💰

- *What: Let prospects book time directly on your calendar*
- *Why: Eliminate back-and-forth emails*
- *Difficulty: Easy*
- *Time Saved: 5-8 hrs/week*
- *Tools: Calendly, Cal.com, GHL*

□ 11. Lead Re-engagement 💰🤖

- *What: Automatically re-engage cold leads*
- *Why: Win back lost opportunities*
- *Difficulty: Medium*
- *Time Saved: 3-5 hrs/week*
- *Tools: Email automation with triggers*

□ 12. SMS/Text Follow-Ups 💰💰

- *What: Automated text message sequences*
- *Why: 98% open rate vs 20% for email*
- *Difficulty: Easy*
- *Time Saved: 4-6 hrs/week*
- *Tools: Twilio, SimpleTexting, GHL*

SECTION 2

CLIENT ONBOARDING

WELCOME CLIENTS SEAMLESSLY

Initial Setup (4 tasks)

- 13. *Welcome Email Sequence* ⚡💰💰
 - *What:* Automated welcome series for new clients
 - *Why:* Consistent experience, sets expectations
 - *Difficulty:* Easy
 - *Time Saved:* 3-5 hrs/week
 - *Tools:* Email automation platform
- 14. *Contract Signing* ⚡💰💰
 - *What:* Electronic signature workflow
 - *Why:* Faster close, no printing/scanning
 - *Difficulty:* Easy
 - *Time Saved:* 5-10 hrs/week
 - *Tools:* DocuSign, HelloSign, PandaDoc
- 15. *Payment Collection* ⚡💰💰💰
 - *What:* Automated invoicing and payment processing
 - *Why:* Get paid faster, reduce manual billing
 - *Difficulty:* Easy
 - *Time Saved:* 8-12 hrs/week
 - *Tools:* Stripe, PayPal, QuickBooks
- 16. *Onboarding Form to Project System* 💰💰
 - *What:* Client intake data auto-populates project
 - *Why:* No re-entering information
 - *Difficulty:* Medium
 - *Time Saved:* 2-4 hrs/week per client
 - *Tools:* Typeform/GHL → Project management

Documentation & Access (3 tasks)

- 17. Client Portal Setup 💰
 - *What: Auto-create client access to files/updates*
 - *Why: Self-service reduces support requests*
 - *Difficulty: Medium*
 - *Time Saved: 3-5 hrs/week*
 - *Tools: Client portal software or custom*
- 18. Document Collection ⚡💰
 - *What: Automated requests for client documents*
 - *Why: Stop chasing paperwork*
 - *Difficulty: Easy*
 - *Time Saved: 2-4 hrs/week*
 - *Tools: Form automation with file upload*
- 19. Credentials Management 💰🔧
 - *What: Secure credential sharing workflow*
 - *Why: Organized, secure, trackable*
 - *Difficulty: Medium*
 - *Time Saved: 1-2 hrs/week*
 - *Tools: LastPass, 1Password business*

Communication Setup (2 tasks)

- 20. Team Introductions ⚡💰
 - *What: Auto-send team bios and contact info*
 - *Why: Personal touch at scale*
 - *Difficulty: Easy*
 - *Time Saved: 1-2 hrs/week*
 - *Tools: Email automation*
- 21. Kickoff Meeting Scheduling ⚡💰
 - *What: Auto-book kickoff call after contract signed*
 - *Why: Momentum matters*
 - *Difficulty: Easy*
 - *Time Saved: 2-3 hrs/week*
 - *Tools: Calendar automation*

SECTION 3

COMMUNICATION & FOLLOW-UP

STAY IN TOUCH WITHOUT LIFTING A FINGER

Email Automation (5 tasks)

- 22. *Email Response Templates* ⚡💰💰
 - *What: Pre-written responses to common questions*
 - *Why: Respond faster, stay consistent*
 - *Difficulty: Easy*
 - *Time Saved: 5-8 hrs/week*
 - *Tools: Gmail templates, Outlook quick parts*
- 24. *Weekly Status Update Emails* 💰💰
 - *What: Automated project update emails to clients*
 - *Why: Proactive communication builds trust*
 - *Difficulty: Medium*
 - *Time Saved: 5-10 hrs/week*
 - *Tools: Project management → Email automation*
- 25. *Birthday/Anniversary Messages* ⚡💰
 - *What: Auto-send personalized messages on special dates*
 - *Why: Strengthen relationships at scale*
 - *Difficulty: Easy*
 - *Time Saved: 2-3 hrs/week*
 - *Tools: CRM automation*
- 26. *Meeting Reminders* ⚡💰
 - *What: Auto-send reminders 24 hours before meetings*
 - *Why: Reduce no-shows*
 - *Difficulty: Easy*
 - *Time Saved: 1-2 hrs/week*
 - *Tools: Calendar automation*

Task & Project Updates (3 tasks)

27. Task Assignment Notifications ⚡💰

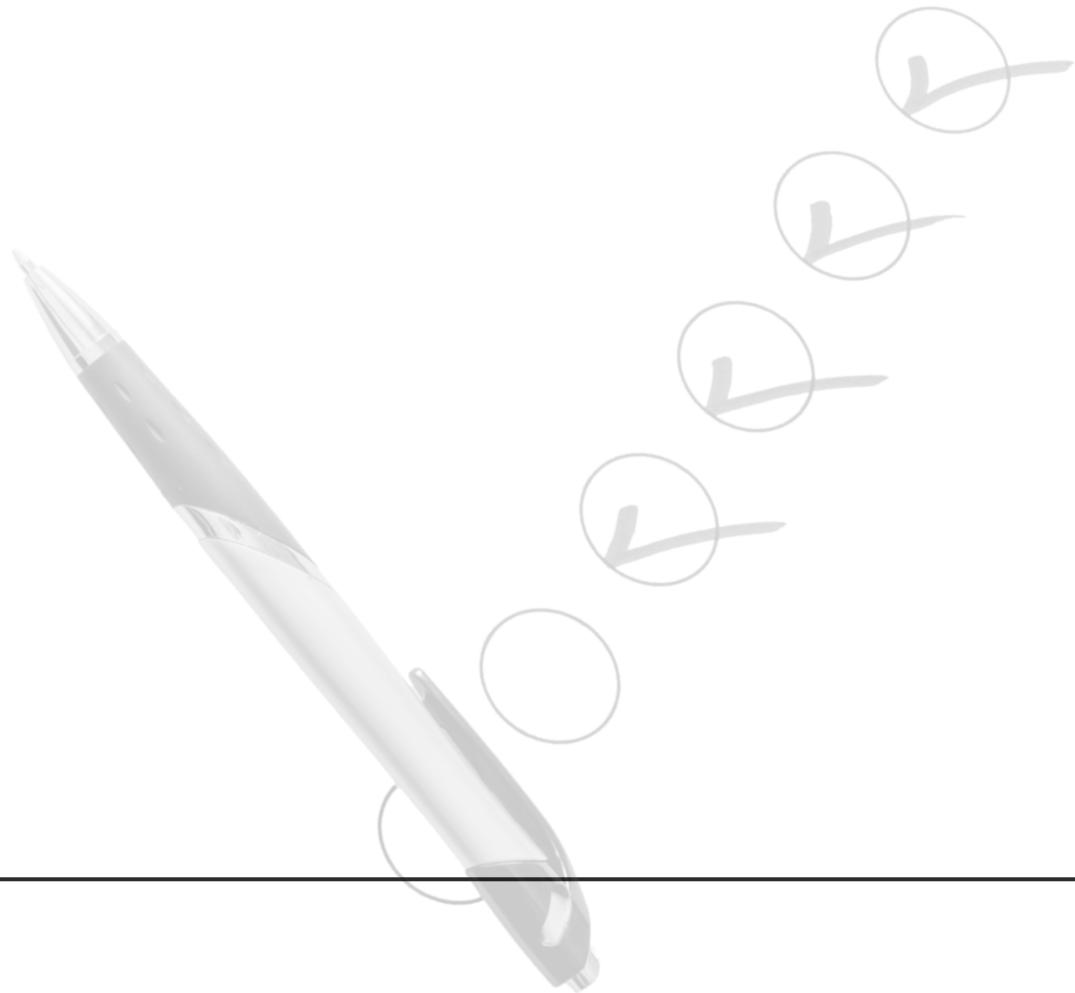
- *What: Auto-notify when task assigned*
- *Why: Nothing falls through cracks*
- *Difficulty: Easy*
- *Time Saved: 2-4 hrs/week*
- *Tools: Project management notifications*

28. Deadline Reminders ⚡💰

- *What: Auto-remind before and when overdue*
- *Why: Hit deadlines consistently*
- *Difficulty: Easy*
- *Time Saved: 3-5 hrs/week*
- *Tools: PM tool automation*

29. Status Change Notifications 💰

- *What: Auto-notify stakeholders when status changes*
- *Why: Everyone stays informed*
- *Difficulty: Easy*
- *Time Saved: 2-3 hrs/week*
- *Tools: Workflow automation*



SECTION 4

OPERATIONS & WORKFLOWS

RUN YOUR BUSINESS ON AUTOPILOT

Data Entry & Management (6 tasks)

- 30. *Spreadsheet to Database Sync* ⚡💰💰💰
 - *What: Auto-sync data between Google Sheets and database*
 - *Why: Single source of truth, no manual updates*
 - *Difficulty: Medium*
 - *Time Saved: 10-20 hrs/week*
 - *Tools: Zapier, Make, or custom API*
- 31. *Form Submissions to CRM* ⚡💰💰
 - *What: All forms automatically create CRM records*
 - *Why: Never manually enter form data again*
 - *Difficulty: Easy*
 - *Time Saved: 5-10 hrs/week*
 - *Tools: Form → CRM integration*
- 32. *Duplicate Detection* 💰🤖
 - *What: Automatically flag/merge duplicate records*
 - *Why: Clean data, avoid confusion*
 - *Difficulty: Medium*
 - *Time Saved: 3-5 hrs/week*
 - *Tools: CRM deduplication tools*
- 33. *Data Validation* 💰🔧
 - *What: Auto-check data quality on entry*
 - *Why: Prevent bad data from entering system*
 - *Difficulty: Medium*
 - *Time Saved: 2-4 hrs/week*
 - *Tools: Form validation rules*

□ 34. File Organization ⚡💰

- *What: Auto-organize files by client/project/date*
- *Why: Find anything in seconds*
- *Difficulty: Easy*
- *Time Saved: 3-5 hrs/week*

□ 35. Backup Automation ⚡💰💰💰

- *What: Automatic daily backups to cloud*
- *Why: Never lose data (priceless!)*
- *Difficulty: Easy*
- *Time Saved: Insurance against disaster*
- *Tools: Backblaze, Carbonite, or cloud sync*

Document Generation (4 tasks)

□ 36. Proposal Generation 💰💰🤖

- *What: Auto-populate proposals from CRM data*
- *Why: Faster turnaround, fewer errors*
- *Difficulty: Medium*
- *Time Saved: 5-10 hrs/week*
- *Tools: PandaDoc, Proposify, or custom*

□ 37. Invoice Generation ⚡💰💰💰

- *What: Automatically create and send invoices*
- *Why: Get paid faster, save time*
- *Difficulty: Easy*
- *Time Saved: 8-15 hrs/week*
- *Tools: QuickBooks, FreshBooks, Stripe*

□ 38. Report Generation 💰💰🤖

- *What: Auto-generate reports from data*
- *Why: Real-time insights, no manual work*
- *Difficulty: Medium*
- *Time Saved: 10-20 hrs/week*
- *Tools: Google Data Studio, Power BI, Tableau*

□ 39. Contract Creation 💰🤖

- *What: Auto-populate contracts with client data*
- *Why: Faster closing, fewer errors*
- *Difficulty: Medium*
- *Time Saved: 3-5 hrs/week*
- *Tools: DocuSign, PandaDoc with templates*

Workflow Automation (3 tasks)

40. Approval Workflows 💰💰

- *What: Auto-route documents for approval*
- *Why: No bottlenecks, clear audit trail*
- *Difficulty: Medium*
- *Time Saved: 5-8 hrs/week*
- *Tools: Workflow automation platforms*

41. Multi-Step Processes 💰💰🔧

- *What: Chain together dependent tasks automatically*
- *Why: Complex workflows without manual coordination*
- *Difficulty: Hard*
- *Time Saved: 10-30 hrs/week*
- *Tools: Zapier, Make, or custom development*

42. Error Notification & Logging 💰🔧

- *What: Auto-alert when processes fail*
- *Why: Catch issues before clients do*
- *Difficulty: Medium*
- *Time Saved: Prevents major issues*
- *Tools: Monitoring and alerting tools*

SECTION 5

REPORTING & ANALYTICS

DATA-DRIVEN DECISIONS, ZERO MANUAL WORK

Dashboard & Reports (4 tasks)

- 43. Real-Time Dashboards 💰🤖
 - *What: Live dashboards that update automatically*
 - *Why: Always know where you stand*
 - *Difficulty: Medium*
 - *Time Saved: 5-10 hrs/week*
 - *Tools: Google Data Studio, Tableau, Power BI*
- 44. Weekly/Monthly Reports ⚡💰💰
 - *What: Auto-generate and email regular reports*
 - *Why: Stakeholders stay informed*
 - *Difficulty: Medium*
 - *Time Saved: 10-15 hrs/week*
 - *Tools: Reporting platform → Email automation*
- 45. Performance Tracking 💰🤖
 - *What: Auto-track KPIs and alert on thresholds*
 - *Why: Never miss important trends*
 - *Difficulty: Medium*
 - *Time Saved: 3-5 hrs/week*
 - *Tools: Analytics platforms with alerts*
- 46. Client Reporting 💰💰
 - *What: Automated client-facing reports*
 - *Why: Show value consistently*
 - *Difficulty: Medium*
 - *Time Saved: 8-12 hrs/week*
 - *Tools: Custom dashboards or reporting tools*

SECTION 6

AI-POWERED AUTOMATION

THE NEXT LEVEL

Advanced AI (4 tasks)

□ 47. AI Chat Support 💰🤖

- *What: AI chatbot handles common questions*
- *Why: 24/7 support, instant responses*
- *Difficulty: Medium*
- *Time Saved: 10-20 hrs/week*
- *Tools: Intercom, Drift, custom GPT*

□ 48. AI Content Generation 💰🤖

- *What: AI drafts emails, posts, content*
- *Why: First drafts in seconds*
- *Difficulty: Easy*
- *Time Saved: 5-10 hrs/week*
- *Tools: ChatGPT, Jasper, Copy.ai*

□ 49. AI Data Extraction 💰🤖🔧

- *What: Extract structured data from documents*
- *Why: Process invoices, receipts, forms automatically*
- *Difficulty: Hard*
- *Time Saved: 10-15 hrs/week*
- *Tools: OCR + AI, custom ML models*

□ 50. AI Sentiment Analysis 💰🤖🔧

- *What: Auto-analyze customer feedback sentiment*
- *Why: Catch problems early, identify trends*
- *Difficulty: Hard*
- *Time Saved: 5-8 hrs/week*
- *Tools: Sentiment analysis APIs*

YOUR AUTOMATION ROADMAP

Step 1: Calculate Your Score

Total tasks checked: ____ / 50 = ____ %

Step 2: Prioritize Your Opportunities

High Priority (Do First): Focus on tasks marked with ⚡ and 💰💰💰

Quick wins I should automate:

1. _____
2. _____
3. _____

Medium Priority (Do Second): Tasks marked with 💰💰

*Tasks to automate next: 4. _____ 5. _____
6. _____*

Low Priority (Do Later): All other tasks

*Longer-term automation goals: 7. _____ 8. _____
9. _____*

Step 3: Calculate Your ROI

Potential Time Savings: If I automate my top 6 priorities, I'll save approximately: _____ hours per week × \$_____ per hour = \$_____ per week

Annual savings: \$_____ × 52 = \$_____ per year

Investment Required: Automation typically costs: \$5,000 - \$25,000 depending on complexity

Your ROI: Annual savings ÷ Investment = _____ % ROI

Example: \$50,000 saved ÷ \$10,000 invested = 500% ROI

Step 3: Calculate Your ROI

Month 1:

- Automate: _____
- Expected savings: _____ hrs/week

Month 2:

- Automate: _____
- Expected savings: _____ hrs/week

Month 3:

- Automate: _____
- Expected savings: _____ hrs/week

Total Quarterly Savings: _____ hours/week

FREQUENTLY ASKED QUESTIONS

Q: Where do I start if everything seems important?

A: Start with lead capture and follow-up (Tasks 1, 9, 10).
These directly impact revenue.

Q: How much does automation cost?

A: Quick wins cost \$500-2,500 each. Complex workflows cost \$5,000-25,000. ROI is typically 300-1000%.

Q: Can I do this myself or do I need help?

A: Easy tasks (⚡): DIY with tools like Zapier
Medium tasks: May need consultant
Hard tasks (🔧): Definitely need expert help

Q: How long does it take to see results?

A: Quick wins: 1-2 weeks
Complex automation: 4-8 weeks
ROI payback: Typically 3-6 months

Q: What if I don't have time to set this up?

A: That's exactly why you need automation! We can help - see below.

READY TO AUTOMATE?

Option 1: DIY with This Checklist

- Start with ⚡ quick wins
- Use tools like Zapier, Make
- Take it one task at a time
- Budget 2-4 hours/week

Option 2: Get Expert Help

Schedule a Free 45-Minute Strategy Call

We'll help you: ✓ Identify your top automation opportunities ✓ Prioritize by ROI ✓ Create a custom roadmap ✓ Show you exactly what's possible

 Book Your Free Strategy Call: [Book Now](#)

About Nexark

We help ambitious businesses automate operations and scale faster.

Our Approach:

1. ***Reality Check™ Audit:*** Find your bottlenecks
2. ***Custom Automation:*** Build what you need
3. ***Implementation:*** Launch in weeks, not months
4. ***Ongoing Support:*** Keep improving

Our Results:

- Average client saves 20-40 hours/week
- ***Typical ROI:*** 400-800% in year 1
- 95% client retention rate

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NOTES & ACTION ITEMS

USE THIS SPACE TO JOT DOWN IDEAS

Tasks that stood out to me:

Questions to ask on strategy call:

Automation ideas for my specific business:

Don't let manual work hold you back. Start automating today! 

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