

AI Audit Checklist for Small & Service Businesses

Use this 1-page audit to quickly spot where AI + automation can save you hours and unlock new revenue.

1. Business Goals (Next 90 Days)

- What are your top 3 business goals in the next 90 days? (e.g. more leads, faster delivery, lower costs).
- Which 2–3 KPIs do you care about most? (e.g. leads/month, close rate, response time, hours saved).
- Where are you or your team currently overwhelmed or bottlenecked?

2. Processes to Target First

- List 5 recurring tasks you do weekly that feel repetitive (email replies, proposals, reporting, data entry, etc.).
- For each task, estimate: minutes per run × times per week = total hours per week.
- Highlight any tasks that are rules-based (if X then Y) or text-heavy (emails, forms, support). Those are strong AI candidates.

3. Data & Tools Check

- Where does your customer data live today? (CRM, spreadsheets, inbox, paper, etc.).
- Are your tools connected? List your main tools (CRM, calendar, website, payment) and note any gaps ("data is double-entered" or "nothing talks to each other").
- Do you already use ChatGPT or other AI tools in your day-to-day? If yes, where?

4. Opportunity Scan – Quick Wins

- Lead handling: Are leads followed up within 5–15 minutes? If not, mark as an AI automation opportunity.
- Customer communication: Could FAQs, follow-ups, reminders, or onboarding emails be drafted or sent automatically?
- Internal admin: Could AI help summarize meetings, generate reports, or prepare task lists from notes?

5. Risk & Guardrails

- What information in your business is sensitive and must never be shared with external tools?
- Do you have clear rules for what AI can draft vs. what a human must approve before sending?
- Who owns reviewing AI outputs and monitoring for quality issues?

6. Prioritize Your First 1–3 Automations

- From the tasks you identified, pick 3 with the biggest impact (time saved or revenue gained).
- Score each on: Impact (1–5), Ease (1–5), and Risk (1–5).
- Circle the one with highest Impact + Ease and lowest Risk. That's your first automation to build.

Want help turning this audit into working automations? Visit santosautomation.com to book a strategy session.