THE ULTIMATE BUSINESS AUTOMATION CHECKLIST

Identify The Processes Slowing Down Your Business
And Discover What Can Be Automated



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INTRODUCTION

As businesses grow, so does complexity.

More customers.
More inquiries.
More communication.
More reporting.
More operational tasks.

Without the right systems in place, teams often spend significant amounts of time on repetitive work that could be automated.

The result?

- Missed opportunities
- Slower response times
- Increased operational costs
- Team burnout
- Inconsistent customer experiences

Automation isn't about replacing people.

It's about allowing your team to focus on higher-value activities while systems handle repetitive and predictable tasks. At Crea8 Impact, we help businesses identify automation opportunities that improve efficiency, increase visibility, and create scalable operational systems.

This checklist will help you evaluate your current workflows and identify areas where automation can make the biggest impact.

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SECTION 01

Lead Management Automation

Why It Matters

Many businesses lose potential customers simply because leads are not managed consistently. Every inquiry should enter a structured process that ensures no opportunity is missed.

Automation Checklist

- Are new leads automatically captured?
- Are leads assigned to the correct team member?
- Are lead sources being tracked?
- Are lead details automatically stored in your CRM?
- Are notifications sent when new inquiries arrive?
- Is lead qualification automated?
- Are follow-ups triggered automatically?

Common Automations

- Website form submissions
- Lead routing
- Lead scoring
- CRM updates
- Instant notifications

Opportunity Score: How many of these processes are still handled manually?

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SECTION 02

Sales Workflow Automation

Why It Matters

Sales teams should spend time selling, not updating spreadsheets or manually tracking customer interactions.

Automation Checklist

- Are sales stages automatically updated?
- Are tasks created when opportunities move forward?
- Are reminders generated automatically?
- Are proposals tracked?
- Are follow-up sequences automated?
- Is customer communication logged automatically?

Common Automations

- Opportunity tracking
- Task generation
- Follow-up reminders
- Pipeline updates
- Proposal workflows

Opportunity Score: How many hours per week could your team save?

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SECTION 03

Client Onboarding Automation

Why It Matters

The first customer experience often sets the tone for the entire relationship.
A structured onboarding process improves consistency and professionalism.

Automation Checklist

- Is a welcome email sent automatically?
- Are onboarding forms automated?
- Are internal teams notified?
- Are onboarding tasks assigned automatically?
- Are customers provided with next steps?
- Is onboarding progress tracked?

Common Automations

- Welcome sequences
- Document collection
- Project creation
- Internal notifications
- Client portal access

Opportunity Score: How consistent is your onboarding experience today?

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SECTION 04

Reporting System Automation

Why It Matters

Many businesses spend hours every week gathering information from multiple platforms. Automation allows reporting to happen in real time.

Automation Checklist

- Are marketing reports automated?
- Are sales dashboards updated automatically?
- Is performance data centralized?
- Are reports generated without manual effort?
- Are stakeholders receiving updates automatically?

Common Automationsefits

- KPI dashboards
- Sales reports
- Marketing reports
- Executive summaries
- Performance alerts

Opportunity Score: How much reporting time could be eliminated?

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SECTION 05

Internal Operations Automation

Why It Matters

Many operational bottlenecks happen behind the scenes.
Automating internal workflows helps teams work faster and more efficiently.

Automation Checklist

- Are approval processes automated?
- Are recurring tasks automated?
- Are internal notifications automated?
- Are project workflows standardized?
- Are handoffs between departments tracked?
- Is operational visibility centralized?

Common Automations

- Task management
- Workflow approvals
- Internal communication
- Process tracking
- Operational reporting

Opportunity Scores: Where are the biggest internal delays occurring?

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SECTION 06

Customer Support Automation

Why It Matters

Customers expect fast and consistent responses.
Automation can improve customer experience while reducing support workload.

Automation Checklist

- Are common questions automated?
- Is support ticket creation automated?
- Are support requests categorized automatically?
- Are customers receiving instant acknowledgements?
- Is customer history visible to support teams?
- Are repetitive inquiries reduced?

Common Automations

- AI chat systems
- FAQ automation
- Ticket management
- Customer notifications
- Self-service resources

Opportunity Score: How much support time is spent answering the same questions repeatedly?

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Team Productivity Improvements

Why It Matters

The goal of automation is not simply efficiency.
The goal is helping teams focus on work that creates the greatest business value.

Productivity Checklist

- Are repetitive tasks minimized?
- Do employees spend less time on administration?
- Are manual updates reduced?
- Is information easy to access?
- Are systems connected?
- Can teams collaborate efficiently?

Areas That Often Improve

- Communication
- Project management
- Reporting
- Customer management
- Sales operations
- Internal workflows

Opportunity Score: Where could your team gain the most productive hours?

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The Connected Business Ecosystem

Why It Matters

The most successful businesses don't automate individual tasks. They connect entire systems.

A Connected Ecosystem Might Include

- Website
- CRM
- Email Marketing
- Appointment Booking
- Reporting Dashboards
- Sales Pipelines
- Customer Support
- Automation Workflows

Questions To Ask

- Do your systems communicate with each other?
- Is information duplicated across platforms?
- Are teams using disconnected tools?
- Can data flow automatically between systems?

Action Steps: Focus on building an ecosystem rather than isolated automations.

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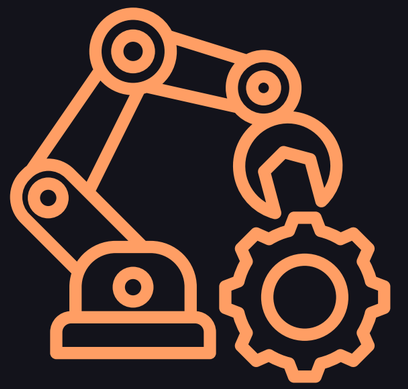
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THE CREA8 AUTOMATION READINESS SCORECARD

Evaluate Your Business







Highly Automated

Your business has strong systems and scalable operational processes.

Moderate Automation Opportunity

Several areas could benefit from automation and workflow improvements.

High Automation Opportunity

Significant efficiency gains are available through automation and system integration.

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THE CREA8 IMPACT AUTOMATION AUDIT

By the end of this checklist, you should be able to identify:

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- Manual tasks consuming valuable time
- Lead management bottlenecks
- Sales process inefficiencies
- Reporting challenges
- Customer support opportunities
- Internal workflow improvements
- Automation opportunities
- Areas where technology can improve scalability

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Ready To Build A Smarter Business?

Most businesses don't need more tools.

They need better systems.

At Crea8 Impact, we help businesses identify automation opportunities, implement AI workflows, optimize CRM systems, and create connected operational ecosystems designed for growth.

Let's Discover What's Possible

EMAIL
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WEBSITE
www.crea8impact.com

BOOK A STRATEGY CALL

Whether you're exploring automation for the first time or looking to optimize existing processes, our team can help identify opportunities that save time, improve efficiency, and support long-term growth.

Automate Smarter. Operate Better. Scale Faster.