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The Small Business AI Automation Checklist

Before you spend a dollar on AI automation — work through this first.

PART 1 — THE 10 WORKFLOW TYPES MOST COMMONLY AUTOMATED

Email triage and routing

Sorting, tagging, auto-responding to high-volume inboxes. High ROI for any team getting 50+ emails/day.

Lead follow-up and CRM updates

Auto-logging contacts, triggering follow-up sequences, updating deal stages without manual entry.

Social media content scheduling

Generating, queuing, and scheduling posts from a brief or content calendar — with human review before publish.

Report and dashboard generation

Pulling data from multiple tools into a weekly summary — no spreadsheet exports, no manual copy-paste.

Scheduling and calendar coordination

Intake forms, automated booking, reminders, and follow-ups that don't require a human to manage.

Document processing and data extraction

Pulling fields from invoices, forms, contracts — into a spreadsheet or CRM automatically.

Customer onboarding sequences

Welcome emails, setup instructions, check-in messages triggered by a purchase or signup.

Internal notifications and alerts

Slack or email alerts when a form is submitted, a deal closes, inventory drops, or a deadline approaches.

Proposal and quote generation

Drafting scoped proposals from a standard template using client intake data — reviewed by a human before sending.

Staff training and knowledge base Q&A

An AI assistant trained on your SOPs and docs that answers team questions without interrupting you.

PART 2 — QUESTIONS TO ASK BEFORE AUTOMATING ANYTHING **Can you describe exactly what happens in this task, step by step?**

If you can't document it clearly, you can't automate it reliably.

 Does this task happen at least weekly?

One-off or rare tasks rarely justify the build cost. Frequency = ROI.

 Is the input consistent enough to process programmatically?

Automation struggles with highly variable, judgment-heavy inputs.

 What's the cost of a mistake here?

High-stakes errors (legal, financial, medical) require more oversight, not less.

 Who owns this task today — and are they bought in?

Automation that bypasses the person who owns a workflow will fail at adoption.

The honest rule: If you can't hand a clear written process to a new hire and have them do it correctly, you're not ready to automate it. Document first. Automate second.

PART 3 — RED FLAGS THAT MEAN YOU'RE NOT READY YET **The process changes every week**

Automation requires stability. If the workflow is in flux, wait until it settles.

 No one has documented how it actually works

If the process only lives in someone's head, automation will encode that person's blind spots.

 You're hoping automation fixes a people or communication problem

It won't. Automation amplifies what's already there — good or broken.

 You need it live in less than 2 weeks

Rushed automation skips testing. Untested automations break in production at the worst time.

PART 4 — HOW TO EVALUATE ANY AI AUTOMATION VENDOR

- Do they show you a live deployment — not a demo?**
Ask to see something running in a real client environment.
- Do you own the system when it's done?**
You should have full access to every component — code, credentials, infrastructure.
- Is there a training handoff?**
Your team needs to be able to operate and troubleshoot without calling the vendor every week.
- Is the retainer optional — or required from day one?**
Retainer-first firms have a financial incentive to create dependency. Good vendors build for independence.
- Can they explain what they're building in plain English?**
If they can't explain it without jargon, they either don't understand it or they don't want you to.

PART 5 — SIMPLE PRIORITIZATION SCORING

For each workflow you're considering, score it 1–3 on each factor. Highest total = highest priority.

FACTOR	SCORE 1	SCORE 2	SCORE 3
Frequency	Monthly or less	Weekly	Daily
Time consumed	<30 min/week	30–90 min/week	2+ hrs/week
Error risk	Low stakes	Medium stakes	High visibility
Process clarity	Undocumented	Mostly clear	Fully documented
Team frustration	Nobody notices	Minor annoyance	Active complaint

Score 12–15: Start here. **Score 8–11:** Queue it next. **Score below 8:** Not yet.

Ready to find your top automation opportunities?

Book a free 30-minute call. We'll map your workflows, identify the highest-ROI targets, and tell you honestly whether automation is the right move — and what it would cost. notimeforai.com · hello@notimeforai.com