

FREE CHECKLIST



The AI Automation Opportunity Checklist

Score your business in under 5 minutes.

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SOFTWARE ENGINEERING · AI AUTOMATION · WEB3 · FINTECH SYSTEMS

HOW TO SCORE YOURSELF

Tick every box that's true for your business today. Most founders check more than they expect — that's the point. Every checked box is manual work quietly costing you hours every week. Your score and what it means is at the end.



CATEGORY 01

Customer Communication & Support



Someone on your team answers the same 5-10 questions over and over, by hand.

Repetition is the single clearest automation signal — if it's asked often, it can be answered automatically.



Customers wait more than a few hours for a first response outside business hours.

Response-time delay directly costs conversions and reviews. This is usually the fastest win to fix.



Leads or messages sometimes fall through the cracks between tools or people.

Anything routed manually between inboxes, spreadsheets, or people will eventually get dropped.



You're paying a person mainly to answer, tag, or route incoming messages.

That's a job description an AI agent can do around the clock, without the headcount.



CATEGORY 02

Sales & Follow-Up



Leads don't get a follow-up unless someone remembers to send one.

Manual follow-up is the single biggest silent leak in most sales pipelines — it depends entirely on memory.



You manually copy lead info between a form, a spreadsheet, and a CRM.

Every manual data hop is a place where a lead gets lost or delayed.

- ☐ **Proposals, quotes, or contracts are built from scratch each time, instead of from a template that fills itself in.**

Templated, auto-filled documents cut hours per deal and reduce copy-paste errors.

- ☐ **You don't know your actual response time to a new lead, in hours or minutes.**

If it's not tracked, it's probably worse than you think — and it's directly fixable.



CATEGORY 03

Data Entry & Admin

- ☐ **Someone manually re-types information that already exists somewhere else in your systems.**

Any duplicate data entry between two tools is a job for an automation, not a person.

- ☐ **Invoices, receipts, or reports are prepared by hand each week or month.**

Recurring document generation on a fixed schedule is one of the easiest, highest-ROI automations to build.

- ☐ **You or your team spend time each week just moving files, updating spreadsheets, or checking on order/task status.**

Status-checking and file-shuffling are pure overhead — zero customer value is created doing them.

- ☐ **Scheduling, reminders, or approvals depend on someone remembering to send a message.**

Anything reminder-based can run itself once the trigger and the message are defined.



CATEGORY 04

Reporting & Decisions

- ☐ **Building a weekly or monthly report takes real hours of copying numbers between tools.**

Reporting is one of the most automatable tasks in any business — the data usually already exists somewhere.

- ☐ **You find out about a problem (low stock, missed deadline, unhappy customer) after it's already urgent.**

Automated alerts on the right trigger turn reactive fire-fighting into a heads-up with time to act.

- ☐ **Decisions wait on a report that's usually a few days out of date by the time someone reads it.**

Live dashboards fed by automation remove the lag between what's happening and what leadership sees.



YOUR SCORE

What Your Checklist Says

0-3 checked — You're in reasonably good shape. Worth revisiting this list again in 6 months as you grow.

4-8 checked — You likely have 5-10+ hours a week of team time going into work software could handle. That's real budget hiding in your current headcount.

9+ checked — Automation isn't a nice-to-have at this point — it's costing you measurable time and money every single week you wait.



Want to know exactly what's automatable?

Send us the one task that's eating the most time. We'll tell you honestly whether AI can handle it, and roughly what it would take — free, in writing, no call required.

<https://oxlabs.us/lets-talk> →