

BORING SYSTEMS

The Small Business Automation Audit

A simple worksheet to find the first workflow worth automating – the one that saves a real person time this week.

 Practical AI automation for small business

The best first automation is usually **boring, repeated, and easy to verify**. Work through the six steps below and the winner usually becomes obvious.

1 List Your Repeated Tasks

Tasks that happen every day or every week. Examples: copying form submissions into a spreadsheet, sending follow-up emails, checking overdue tasks, summarizing customer requests, updating a CRM, sending appointment confirmations, building weekly reports.

2 Score Each Task (1–5)

Task	Repeats Often	Takes Time	Easy to Describe	Mistakes Matter	Total
Example: lead follow-up	5	4	5	5	19

The highest total score usually wins. That's your first automation candidate.

3 Map the Current Process

What triggers the task?

Who needs to know? (people)

What information is needed? (inputs)

Where should the result be stored?

What should happen next? (actions)

Notes

4 Decide the Automation Type

☐ Capture information

☐ Route information

☐ Summarize information

☐ Draft a response

☐ Create a reminder

☐ Update a spreadsheet / CRM

☐ Generate a report

☐ Alert a human

5 Add Guardrails

Before automating, decide: What should it never do? When should it ask a human? What should be logged? What does success look like? How will you know it failed?

6 Build the Smallest Useful Version

Good first version

- Captures the lead
- Logs it somewhere reliable
- Drafts a response
- Notifies a human
- Creates a follow-up reminder

Bad first version

- Auto-replies to every customer
- Makes promises
- Changes pricing
- Skips human review
- Has no logs

7 Review After One Week

How many times did it run? How much time did it save? Did it make mistakes? Did anyone ignore it? What should be simpler? What's the next task to automate?

Rule of thumb: If a workflow saves 10 minutes per day, that's about 40 hours per year. If it saves you from missing even one serious lead, it may pay for itself immediately. **Start with the boring workflows** – they're usually where the money is.