

GUIDED ASSESSMENT

The AI & Automation Audit Workbook

A step by step framework to uncover where AI and automation can transform your operations. Built to walk through together, not fill out alone.

BEFORE WE BEGIN

Hey, glad you're here.

This is not a form you fill and forget. Think of it as a conversation starter between us. Together, we will figure out exactly where AI and automation can make the biggest difference in your business.

Set aside about 35 to 40 minutes. We will walk through six phases together. Each one looks at a specific layer of your operations. By the end, we will have a clear map of what to automate, what to enhance with AI, and exactly where to start. I will be right here to help you make sense of it all.

At SBD, this is what we do day in and day out. We sit with businesses, dig into the messy parts of their operations, and build systems that actually hold up in production. Not demos that look good on a call and break in real life. Real systems with error handling, monitoring, and retry logic baked in.

We have worked with companies across manufacturing, D2C, professional services, consulting, and distribution. Our clients are based in the US, UK, Dubai, Singapore, and India. Whether the project is a quick win workflow for \$500 or a full scale operations overhaul at \$25,000, our approach stays the same: understand deeply, build right, and stay involved.

60+

CLIENTS SERVED

1,000+

WORKFLOWS BUILT

3+

YEARS IN OPERATION

We work across platforms like Retool, SmartSuite, n8n, Make, ClickUp, Monday.com, and integrate with tools your team already uses: Google Workspace, Slack, WhatsApp, HubSpot, Zoho, SAP, Tally, QuickBooks, Razorpay, Stripe, and many more. Our portfolio has video walkthroughs, detailed case studies, and examples across different industries and use cases. Take a look. It will give you a feel for how we think and what we build.

[View our portfolio & case studies](#)

PHASE 1

Understanding Your Business

Let's start with the lay of the land. Before we look at any tools or workflows, I need to understand what your business actually does and how it runs day to day.

Why this matters: Every business is different. The automation that saved a manufacturing company 40% of their time will not necessarily apply to a consulting firm. This phase helps us understand your context so nothing we recommend feels generic or disconnected from your reality.

COMPANY / BUSINESS NAME

INDUSTRY / SECTOR

TEAM SIZE

About Your Operations

- What does a typical day look like for your ops or admin team? Walk me through morning to evening.
- If you had to point to the one area that feels the most chaotic or manual right now, what would it be?
- Are there tasks that only one specific person knows how to do? What happens when they are unavailable?
- How do you currently handle communication across departments? (Slack, WhatsApp, email, in person?)

Growth & Bottlenecks

- Where do things slow down when your business gets busier? What breaks first under pressure?
- Have you ever lost a customer or missed a deadline because of an internal process failure?
- What would need to change for you to double your capacity without doubling your team size?

NOTES: ANYTHING ELSE I SHOULD KNOW ABOUT HOW YOUR BUSINESS RUNS

PHASE 2

Process & Workflow Mapping

Now let's get specific. We are going to look at your actual workflows and figure out where time, money, and energy are quietly leaking.

A quick note: Don't worry about getting this perfect. Even rough answers help. When we sit down together, I will help you connect the dots and fill in the gaps. The goal is to capture what is real, not what is ideal.

Sales & Lead Management

- How do leads come in today? (website, referrals, cold outreach, social media?)
- What happens after a lead comes in? Who follows up, and how quickly?
- Do you have a CRM? Is it actually maintained, or is it a graveyard of outdated contacts?
- How many leads do you think you lose simply because follow ups fall through the cracks?

Client Onboarding & Delivery

- Walk me through what happens after someone says "yes." From payment to delivery, how many steps?
- Is there a standard onboarding process, or does it change depending on who is handling it?
- How do clients get updates on their project or order? Do they have to ask, or is it proactive?

Finance & Admin

- How are invoices generated? Manual, semi automated, or fully automated?
- Do you have visibility into outstanding payments right now, without checking three different places?
- How much time per week does your team spend on data entry, copy pasting, or reconciliation?

Internal Ops & Reporting

- How do you track tasks internally? Is there a system, or is it mostly memory and chat messages?
- Do you have any dashboards or reports your team checks regularly? Or is reporting ad hoc?
- If I asked "how did the business perform last month?" how long would it take to get that answer?

PHASE 3

Tools & Systems Audit

Let's look at what you are already paying for and using. Most businesses have more tools than they realize, and half of them are not talking to each other.

Here is the thing: We are not going to rip out everything and start from scratch. The best solutions usually connect and enhance what you already have. This audit helps us understand your current foundation before we build on it.

Current Tool Inventory

List the tools you use in each category and note any pain points.

CATEGORY	TOOL(S) YOU USE	ACTIVELY USED? PAIN POINTS?
CRM / Sales		
Accounting / Finance		
Project Management		
Communication		
Email / Marketing		
Spreadsheets / Docs		
HR / Payroll		
Customer Support		
E-commerce / Website		
Other		

The Real Questions

- Which of these tools do you actually love? Which ones does your team secretly hate or avoid?
- Are any of these tools doing the same job? (Overlap usually means wasted money and confusion.)
- Is there data sitting in one tool that you wish was automatically available in another?
- How much are you spending per month on all these tools combined? (Rough estimate is fine.)

PHASE 4

AI & Automation Opportunity Map

This is where it gets exciting. Based on what you have shared so far, let's identify where AI and automation can plug in and make a measurable difference.

We will fill this together: During our call, I will help you identify and score each opportunity based on what you told me in Phases 1 through 3. For now, think about which of these areas feel the most painful or time consuming.

PROCESS / AREA	CURRENT STATE	AUTOMATION / AI OPPORTUNITY	IMPACT	EFFORT
Lead capture & follow up				
Client onboarding				
Invoice & payment tracking				
Internal task management				
Customer communication				
Reporting & dashboards				
Data entry & sync				
HR / People ops				

Impact scale: High: saves hours per week or prevents revenue loss Medium: noticeable improvement, nice to have
Low: convenience upgrade, not urgent

What AI can do here: Auto qualify leads using intelligent scoring, generate invoices from order data, send WhatsApp updates when project stages change, enrich CRM data automatically, summarize meeting notes into tasks, or create dashboards that pull from five different tools into one view. We will match specific solutions to your specific problems.

PHASE 5

Impact & Prioritization

Not everything needs to happen at once. Let's figure out what moves the needle fastest and what is a longer play.

The way I think about it: Start with the thing that is either costing you the most time or losing you the most money. Nail that first. Then use the momentum (and the ROI) to fund the next phase. That is how sustainable automation works.

⚡ Do Now: Quick Wins
High impact, low effort. Can be built in 1 to 2 weeks. These pay for themselves almost immediately.

YOUR QUICK WINS

📅 Do Next: Strategic Builds
High impact, moderate effort. These take 3 to 6 weeks but transform how a function operates.

YOUR STRATEGIC BUILDS

🕒 Plan For Later: Big Bets
High impact, high effort. System overhauls worth doing once the foundation is solid.

YOUR BIG BETS

👁️ Watch & Revisit
Low impact right now, or not urgent. Park these. We will revisit as your systems evolve.

PARKED ITEMS

TOP 3 PRIORITIES WE AGREED ON (WE WILL FINALIZE THIS TOGETHER)

PHASE 6

Readiness & Resource Check

Last phase. Let's make sure we are aligned on the practical stuff. Budget, timelines, and who is involved. No point building a plan that does not fit your reality.

Budget & Investment

- Have you set aside a budget for automation or AI projects this year? (Even a rough range helps: \$500, \$5K, \$15K+)
- Would you prefer a one time build or an ongoing monthly engagement where we keep improving things?
- What is the cost of NOT fixing these problems? (In hours wasted, leads lost, people burned out?)

Timeline & Urgency

- Is there a deadline driving this? (New quarter, seasonal spike, investor expectations, team scaling?)
- How quickly would you want to see the first thing live? (1 week? 1 month? Flexible?)

Team & Decision Making

- Who else needs to be involved in this decision? (Co-founder, ops manager, finance head?)
- Do you have someone on your team who can be our point of contact during the build?
- Has your team tried automation before? If so, what worked and what did not?

Defining Success

- Six months from now, if this engagement was a massive success, what would that look like for you?
- What would make you feel like it was not worth it? (Helps me know what to avoid.)

ANYTHING ELSE ON YOUR MIND: CONCERNS, QUESTIONS, THINGS YOU NEED CLARITY ON

AUDIT SUMMARY

Your Automation Readiness Snapshot

Here is where we pull everything together. After going through the phases, this is the big picture view of where you stand and where we are headed.

We will complete this together on our call. I will score each area based on our conversation, identify the biggest opportunities, and give you a clear recommendation on where to start. No fluff. Just what is real and actionable.

READINESS SCORE BY AREA	
Sales & Lead Management	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Client Onboarding & Delivery	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Finance & Admin	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Internal Ops & Reporting	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Tools & Systems Integration	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
AI Readiness	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

TOP 3 AUTOMATION OPPORTUNITIES IDENTIFIED

RECOMMENDED STARTING POINT

ESTIMATED IMPACT (TIME SAVED, REVENUE RECOVERED, CAPACITY UNLOCKED)

PROPOSED TECH STACK & APPROACH

ESTIMATED TIMELINE & INVESTMENT RANGE

THANK YOU FOR YOUR TIME

Appreciate you going through this with me.

Here is what happens next.

This workbook is not meant to sit in a folder. It is the starting point for a real conversation about what is possible for your business. Now that we have the lay of the land, here is exactly how we take this forward:

- 1 Book an AI Strategy Call.** We will go through your answers together, fill in the gaps, and I will share my initial recommendations on what to build first and why.
- 2 You get a custom proposal.** Based on our call, you will receive a clear plan: what to build, what tech to use, realistic timeline, and investment. No vague estimates or generic templates.
- 3 We build it together.** Once aligned, we start with the highest impact item. You will see progress weekly, not monthly. And I will be in the trenches with your team until it runs like clockwork.

[Book Your AI Strategy Call →](#)