



FIVE75 Business Self Assessment AI Efficiency Checklist:

How Optimized is Your Business?

Discover where AI can help you save time, reduce costs, and increase efficiency!

☒ **INSTRUCTIONS:** Answer "Yes" or "No" to each question. The more "No" answers you have, the more AI automation could help your business.

1 Lead Generation & Client Acquisition

- ☐ Do you have a system in place to track and follow up with leads automatically?
 - ☐ Is your lead outreach automated, or do you manually reach out to prospects?
 - ☐ Do you have an email capture system to nurture leads over time?
 - ☐ Are you consistently following up with every inquiry, or do leads sometimes fall through the cracks?
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2 Customer Communication & Engagement

- ☐ Do you have an AI chatbot, FAQ system, or automation to handle common questions?
 - ☐ Are customer inquiries answered within 24 hours without fail?
 - ☐ Do you use automated email responses or chatbots to improve response time?
 - ☐ Do you have a centralized system that tracks all customer interactions across email, chat, and social media?
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3 Workflow & Task Automation

- ☐ Do you automate repetitive tasks like data entry, scheduling, and invoicing?
- ☐ Is your data automatically synced between different tools (e.g., CRM, email, spreadsheets)?

- ☐ Do you have automated reminders for follow-ups, appointments, and tasks?
 - ☐ Have you identified time-consuming tasks that AI could optimize?
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4 Content & Social Media Automation

- ☐ Do you schedule your social media posts in advance using automation?
 - ☐ Are you repurposing content efficiently across multiple platforms with automation?
 - ☐ Do you use AI-generated content or analytics tools to improve engagement?
 - ☐ Do you have a system in place to track content performance and adjust strategy accordingly?
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5 Business Operations & Security

- ☐ Are invoices, contracts, and payments tracked automatically?
 - ☐ Do you use AI for fraud detection, security monitoring, or compliance tracking?
 - ☐ Is document organization and management automated within your business?
 - ☐ Do you have automated workflows in place to reduce human error?
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Your AI Efficiency Score

- ☒ **0-5:** You're running everything manually—AI could save you hours each week!
- ☒ **6-10:** You've started automating, but there's plenty of room for improvement.
- ☒ **11-15:** You're on the right track! A few more AI optimizations could make your business even more efficient.

 **Want to automate your business?** Download our AI Automation Guide and get a **free AI efficiency audit** when you sign up for our newsletter!