



Business Systems Checklist

Identify your biggest operational gaps before they cost you more revenue.

Rate each area 1–5. Circle your score. Under 25: critical gaps. 25–35: room to scale. 36+: ready for advanced automation.

LEAD CAPTURE & HANDOFF

New leads are captured automatically — no manual copy-paste from email or voicemail.	1	2	3	4	5
Every lead receives a response within 5 minutes, 24/7 — including after hours and weekends.	1	2	3	4	5
Your team always knows which leads are new, in progress, or gone cold.	1	2	3	4	5
Leads that don't book are automatically followed up — not left to die in a spreadsheet.	1	2	3	4	5

APPOINTMENT SCHEDULING

Clients can book, reschedule, or cancel without calling your office.	1	2	3	4	5
Appointment reminders go out automatically — SMS and/or email — 24 hrs and 2 hrs before.	1	2	3	4	5
No-shows trigger automatic re-engagement, not a manual phone call.	1	2	3	4	5
Your dispatcher has a live view of the day's schedule without checking multiple systems.	1	2	3	4	5

INVOICING & COLLECTIONS

Invoices are sent within 24 hours of job completion — automatically.	1	2	3	4	5
Overdue invoices trigger a follow-up sequence, not a manual reminder from your admin.	1	2	3	4	5
You know your average days-to-pay without digging through QuickBooks.	1	2	3	4	5

Payment links are included in every invoice — clients can pay in one click.

1	2	3	4	5
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TEAM & OPS VISIBILITY

Your team gets job updates and dispatch changes via text or app — not phone calls.

1	2	3	4	5
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You can see job status, revenue, and pipeline health in one place, updated daily.

1	2	3	4	5
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When a job is completed, the next step (invoice, review request, follow-up) happens automatically.

1	2	3	4	5
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You are not the single point of failure for any daily operational process.

1	2	3	4	5
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CLIENT EXPERIENCE & RETENTION

Clients receive a clear onboarding sequence when they sign — not a PDF attachment.

1	2	3	4	5
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Review requests go out automatically after every completed job.

1	2	3	4	5
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Repeat clients are identified and receive different outreach than new leads.

1	2	3	4	5
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You have a defined process for winning back clients who haven't used you in 90+ days.

1	2	3	4	5
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Total: _____ / 100

Under 25: Critical gaps | 25–35: Room to scale | 36+: Advanced automation ready

Book a free 30-minute Operations Audit at bridgepath-ai.tech

DISCLAIMER: This checklist is provided for general informational and self-assessment purposes only. Scores and recommendations do not constitute professional business, legal, financial, or technical advice, and do not create any obligation on the part of BridgePath AI. Individual results from automation depend on many factors unique to each business. BridgePath AI makes no representation or warranty that any specific outcome will result from implementing automation services.



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