

15 POINT

BUSINESS AUTOMATION CHECKLIST






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LEARN WHAT IT TAKES TO
Operate Your Business on Autopilot

Automator™ 15 Point Business Automation Checklist





Section 1: Core Systems

Item	Feature	Criteria
<input type="checkbox"/>	 <p>Webseller Virtual Storefront</p>	<p>Check your website for the following at minimum:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Online Scheduling <input type="checkbox"/> Chatbot <input type="checkbox"/> Lead Generation Forms <input type="checkbox"/> Online Payments <input type="checkbox"/> Support Ticket System <input type="checkbox"/> Reputation Management <p>Download Full Webseller Checklist</p>
<input type="checkbox"/>	 <p>Project Manager</p>	<p>Check your project manager for the following:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Manage Tasks <input type="checkbox"/> Assign Tasks to Users <input type="checkbox"/> Track Task Progress <input type="checkbox"/> Task Comments <input type="checkbox"/> Notifications on Status changes
<input type="checkbox"/>	 <p>CRM</p>	<p>Your CRM should have the following::</p> <ul style="list-style-type: none"> <input type="checkbox"/> Customizable Funnel Stages to match your sales process <input type="checkbox"/> Sales Rep Account Management <input type="checkbox"/> Customizable Reporting
<input type="checkbox"/>	 <p>Customer Portal</p>	<p>Your Customers should be able to:</p> <ul style="list-style-type: none"> <input type="checkbox"/> See status of Current Orders <input type="checkbox"/> See Order History <input type="checkbox"/> Submit New Orders <input type="checkbox"/> Update Existing Orders
<input type="checkbox"/>	 <p>Email & SMS Manager</p>	<p>Your Email Manager should allow you to:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Send Email & SMS to Customers <input type="checkbox"/> Create Templates <input type="checkbox"/> Create Multi Step Email Series <input type="checkbox"/> List Segmentation <input type="checkbox"/> Track recipient activity (opens, clicks, and bounces)

	 Staffing Portal	<p>Your staffing portal should allow applicants to:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Create an account <input type="checkbox"/> Submit their resume <input type="checkbox"/> Complete competency tests <input type="checkbox"/> Submit documents <input type="checkbox"/> Complete training
	 System-to-System Integrations	<p>All of your systems should be able to:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Integrate with 3rd Party Systems <input type="checkbox"/> Trigger Workflows when new data is added <input type="checkbox"/> Send data to 3rd party systems <input type="checkbox"/> Create new records when data is received from another system







Section 2: Data Entry Add-Ons

Item	Feature	Criteria
	 Lead Processing	<p>Your website lead forms should enter new leads into your:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Email & SMS Manager <input type="checkbox"/> CRM <input type="checkbox"/> Other systems as needed.
	 Order Processing	<p>Your ordering system should:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Enter Orders into Project Manager <input type="checkbox"/> Enter Customers into Email & SMS Manager <input type="checkbox"/> Enter Data into Other systems as needed.







Section 3: Project Manager Add-Ons

Item	Feature	Criteria
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	 <p>Project Workflow Templates</p>	<p>When a new order is received, your project manager should:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Create all tasks related to an order <input type="checkbox"/> Auto-Assign Tasks to specific employee(s) or Team <input type="checkbox"/> Send Notifications when new tasks are assigned <input type="checkbox"/> Include all details related to the order
	 <p>Time Tracking</p>	<p>Your Time Tracking should allow employees to:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Start & Stop Time Tracking <input type="checkbox"/> Associate time tracked to specific projects <input type="checkbox"/> Generate Custom Reports of Time Spent on projects.







Section 4: Customer Manager Add-Ons

Item	Feature	Criteria
	 <p>Customer Onboarding</p>	<p>Your customer portal should allow customers to follow simple procedures to*:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Signup & Manage their account <input type="checkbox"/> Submit details needed <input type="checkbox"/> Upload Files <input type="checkbox"/> Agree to your Business Terms and Conditions <p><i>*If you provide services that require customers to provide information before you can complete their orders</i></p>
	 <p>Customer Segmentation</p>	<p>Your Email & SMS Manager should automatically add new leads and customers to specific segmented lists such as:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Demographics (Age Range, Gender, etc) <input type="checkbox"/> Products Ordered <input type="checkbox"/> Location



Section 5: Human Resources Add-Ons

Item	Feature	Criteria
	 Recruitment Helper	Your staffing portal should: <ul style="list-style-type: none"><input type="checkbox"/> Rate and Sort Candidates based on your criteria<input type="checkbox"/> Notify Your Team when candidates complete their application<input type="checkbox"/> Send Candidate Data to 3rd Party Systems as Needed
	 Training Center	Your staffing portal should allow new hires to: <ul style="list-style-type: none"><input type="checkbox"/> Complete Online Training<input type="checkbox"/> Complete Training Competency<input type="checkbox"/> Report Training Progress to your team

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15
Years in Business



15
Mergers & Acquisitions



5.0
Star Google Rating



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Involvement in mergers and acquisitions signals a thriving business. We've had the privilege of helping our top clients reach this milestone. Whether they are selling to retire or expanding their portfolio and market share. Our marketing systems have supported them every step of the way.



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