

Foundari Automation Readiness Assessment



Is automation going to save you time — or create more chaos?

Introduction

Automation should reduce friction, not multiply it. This quick but powerful assessment will help you evaluate your automation readiness by scoring eight foundational pillars across **marketing, sales, ops, and client delivery**.

Once you tally your score, you'll get clear guidance on what to fix first — and what to automate next.

Take 5 minutes. Get a score. Move forward with confidence.

How to Use This Assessment

Rate yourself from 0 (not true yet) to 5 (fully in place) in each section. Add your scores as you go. Be honest — this is here to guide, not judge. to tally your score as you go. Be honest—this tool is here to guide, not judge.

1. Manual Workload

- Do you do repeatable work by hand?
- Are you copying and pasting info between tools or rebuilding the same assets?
- Are "little admin tasks" blocking real growth work?
- Do small errors happen because things rely on memory?

Score (1–5): _____

2. System Sprawl

- Does your tool stack feel clean — or scattered?
- Is there a single source of truth for customer and project info?
- Are tools connected, or just co-existing?
- Do you pay for platforms that aren't truly used or owned?

Score (1–5): _____

3. Lead Handling

- Do leads get a fast, consistent response every time?
- Is your speed-to-lead reliable (not dependent on someone "seeing it")?
- Do leads ever slip through cracks?
- Are inquiries tracked from first touch to next step?

Score (1–5): _____

4. Sales Workflow

- Is your sales process defined — or improvised?
- Are pipeline stages clear and repeatable?
- Are proposals, follow-ups, and next steps consistent?
- Does sales handoff to onboarding feel smooth?

Score (1–5): _____

5. Client Delivery

- Is delivery templated — or rebuilt every time?
- Do projects follow a clear workflow with standard milestones?
- Are tasks assigned automatically, or manually managed?
- Is client communication structured and predictable?

Score (1–5): _____

6. Reporting

- Do you know what's working — without digging for it?
- Can you see lead sources, pipeline health, and delivery status quickly?
- Are KPIs tracked consistently (not in random spreadsheets)?
- Are decisions made with data, not guesswork?

Score (1–5): _____

7. Team Efficiency

- Is your team operating from systems — or duct tape?
- Do people know the process, or do they "figure it out"?
- Are responsibilities clear, or constantly re-decided?
- Do bottlenecks happen because knowledge lives in someone's head?

Score (1–5): _____

8. Automation Mindset

- Is your team ready to adopt automation — or wary of it?
- Is there ownership for process improvement?
- Does leadership prioritize systems (time + budget + attention)?
- Do you improve workflows intentionally — or only when things break?

Score (1–5): _____

Total Score: _____ / 40

Automation Tier Results & Guidance



0–15: Not Ready (Stuck in Manual Mode)

You're doing too much by hand — and automation will break if you rush it.

Key Signs:

- Work lives in inboxes and people's heads
- Tools don't share data cleanly
- Follow-up and delivery depend on heroic effort

Pro Tips:

- Pick one "source of truth" (CRM/project hub) before adding automations
- Define a simple lead sale delivery workflow on paper first
- Automate one high-frequency task (not everything)

Resources:

- [Download: Automation Readiness Super Prompts](#)

Services to Consider:

- Systems Foundation Sprint
- CRM + Pipeline Setup
- Process Mapping & Templates

16–25: Opportunity Zone (Ready for Targeted Wins)

You've got structure — but inconsistencies and gaps are costing you time.

Key Signs:

- Some automation exists, but it's fragile
- Leads are tracked... sometimes
- Reporting isn't fast or reliable

Pro Tips:

- Tighten the handoffs: inquiry follow-up proposal onboarding
- Standardize templates for emails, tasks, and delivery milestones
- Automate speed-to-lead + follow-up before anything fancy

Resources:

- [Download: Automation Readiness Super Prompts \(Opportunity Zone\)](#)

Services to Consider:

- Lead Capture + Follow-Up Automation
- Sales Workflow Buildout
- Delivery Workflow Automation

26–40: Ready to Automate (Blueprint Time)

You have the fundamentals — now automation will create real leverage.

Key Signs:

- Processes are defined and repeatable
- Tools are mostly connected and owned
- You're ready to scale without adding chaos

Pro Tips:

- Build a full automation map across marketing, sales, delivery, reporting
- Add dashboarding so you can manage growth with visibility
- Optimize your customer journey with system-to-system consistency

Resources:

- [Download: Automation Readiness Super Prompts \(Ready to Automate\)](#)

Services to Consider:

- Automation Blueprint + Build
- CRM + Lifecycle Automation
- Reporting Dashboard + KPI System

About Foundari

We help growth-minded businesses scale faster through clear brands, smart marketing, and seamless systems.

Whether you're just starting or scaling a thriving business, we meet you where you are.

foundari.com

Book a quick [Automation Readiness Review](#)

We'll review your score, pinpoint what's creating drag, and map a clear next step.