



Business Automation Assessment Questionnaire

Basic Business Info

Business Name:

Contact Name:

Website

Email

Phone:

Industry / Type of Business, i.e. Publishing, Retail, Clothing, etc.:

Business Structure

Brick & Mortar Online Hybrid

Do you operate from: Home Office Multiple locations

Service Area: Local Regional National International

Customers

Your customers are primarily: B2C B2B

How do customers find you today? Website Social Media Referrals Advertising Direct Marketing

Technology Employed

Website Host:

Email Host:

Devices Used: Windows Mac Linux Other: _____

Business Software Used

List software used (Office, CRM, Accounting, etc.):

Processes & Workflow

Most time-consuming tasks:

Most repetitive tasks:

Automation Goals

What tasks would you like to see automated?

Where is your business inefficient?

What causes delays or errors?

Customer/Client Interaction

How do customers contact you? Email Phone Website Other: _____

How do you track customer interactions?

Data & Records

Where is your data stored? Locally Cloud

Do you back up your data? Yes No **How often?** Hourly Daily Weekly Monthly

Goals

What does success look like after automation?

Instructions for shooting video

We don't need a feature file about your business. Use the lowest frame resolution to keep the file size small (10 MB). The main purpose of the video is to provide an overview of your business operation, current technology and systems use. Be sure to narrate the video while shooting. If we need additional we will contact you.