

QUICK WINS AUDIT TEMPLATE

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Think you don't have enough to automate?



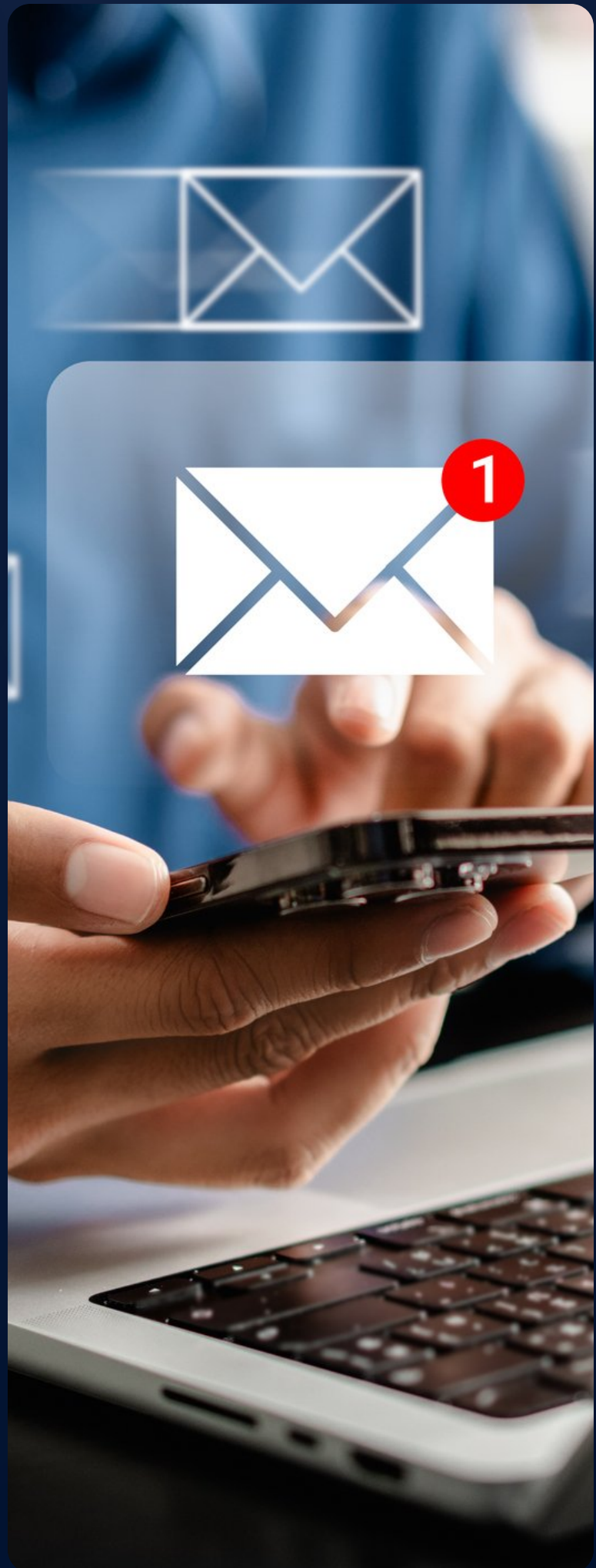
Most teams feel that way at first — until they run this checklist.

**This simple audit helps uncover
low-effort, high-return
opportunities hiding in your day-to-
day work.**

Use this to spot tasks you're repeating, delaying, or doing manually — and see how small wins can quickly stack up.

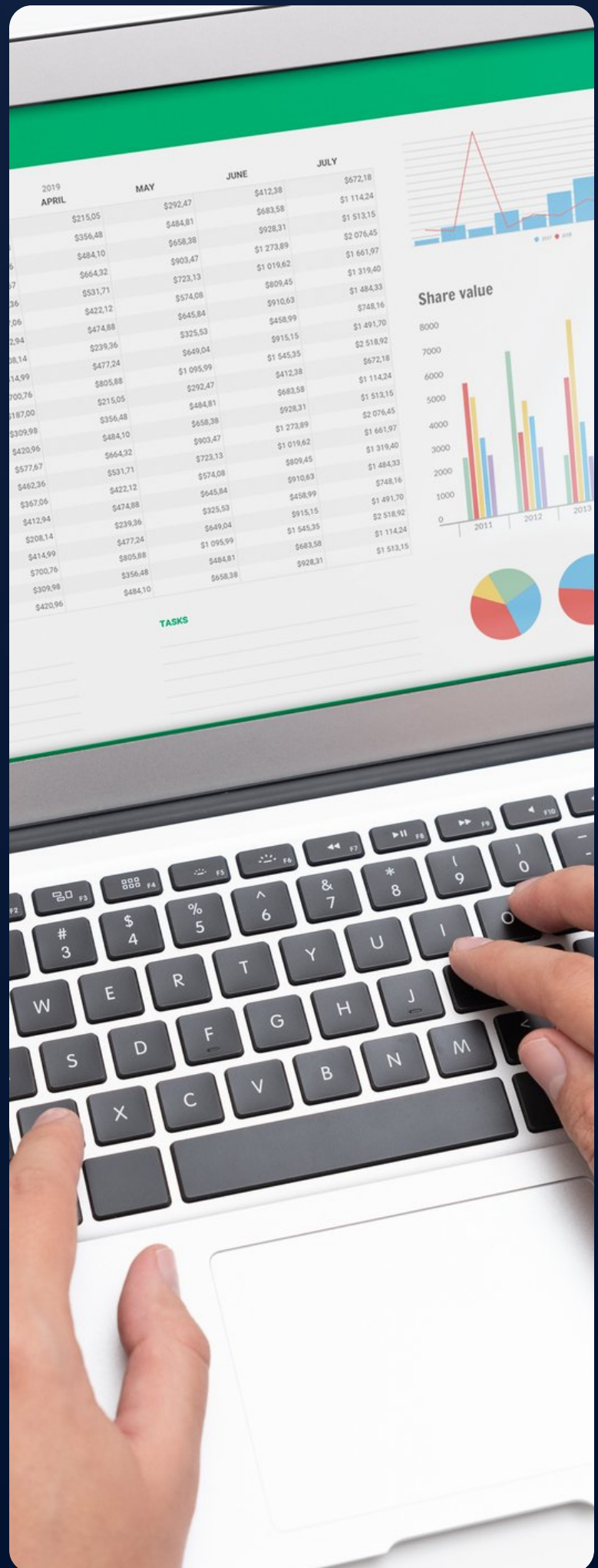
EMAIL & COMMUNICATION

- ☐ Are you manually sending the same emails to clients, leads, or candidates?
- ☐ Do you follow up with prospects without using templates or triggers?
- ☐ Are appointment reminders or confirmations sent manually?



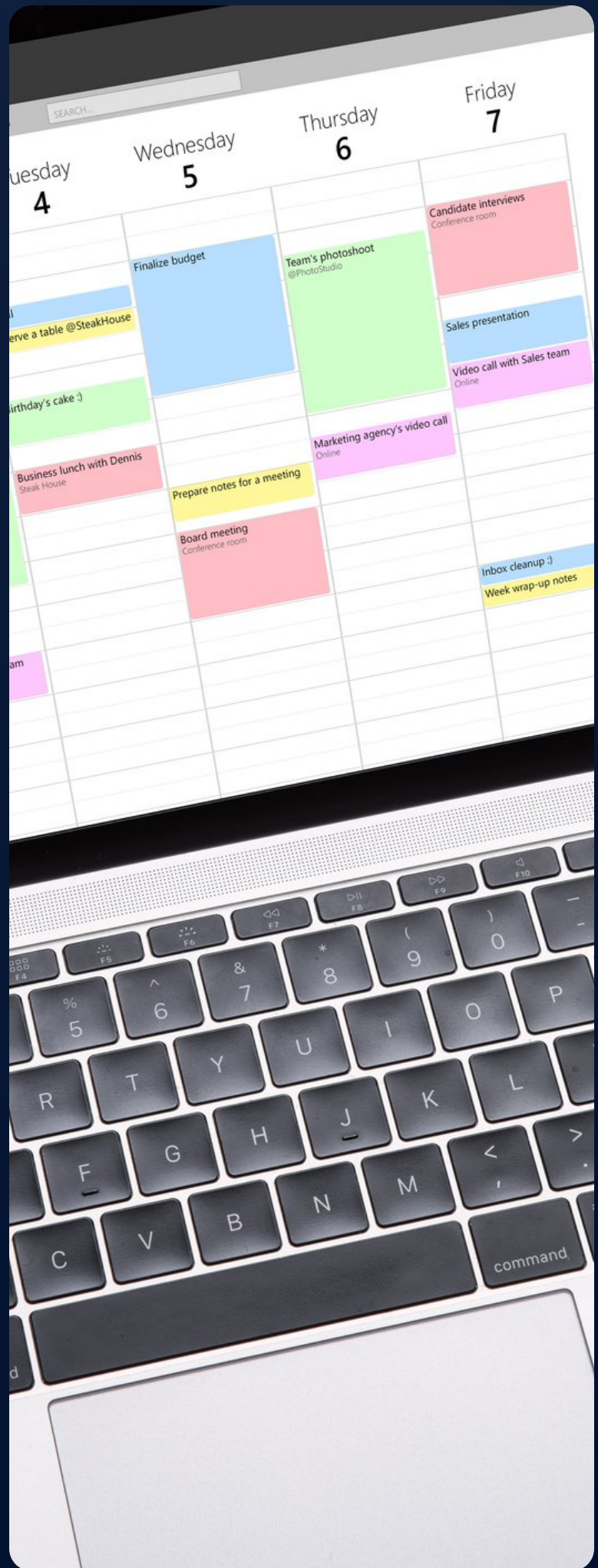
DATA ENTRY & DOCUMENTATION

- ☐ Are you copying/pasting information between tools or spreadsheets?
- ☐ Do you update multiple systems when onboarding a new client or hire?
- ☐ Is there a form or intake process that could trigger a workflow?



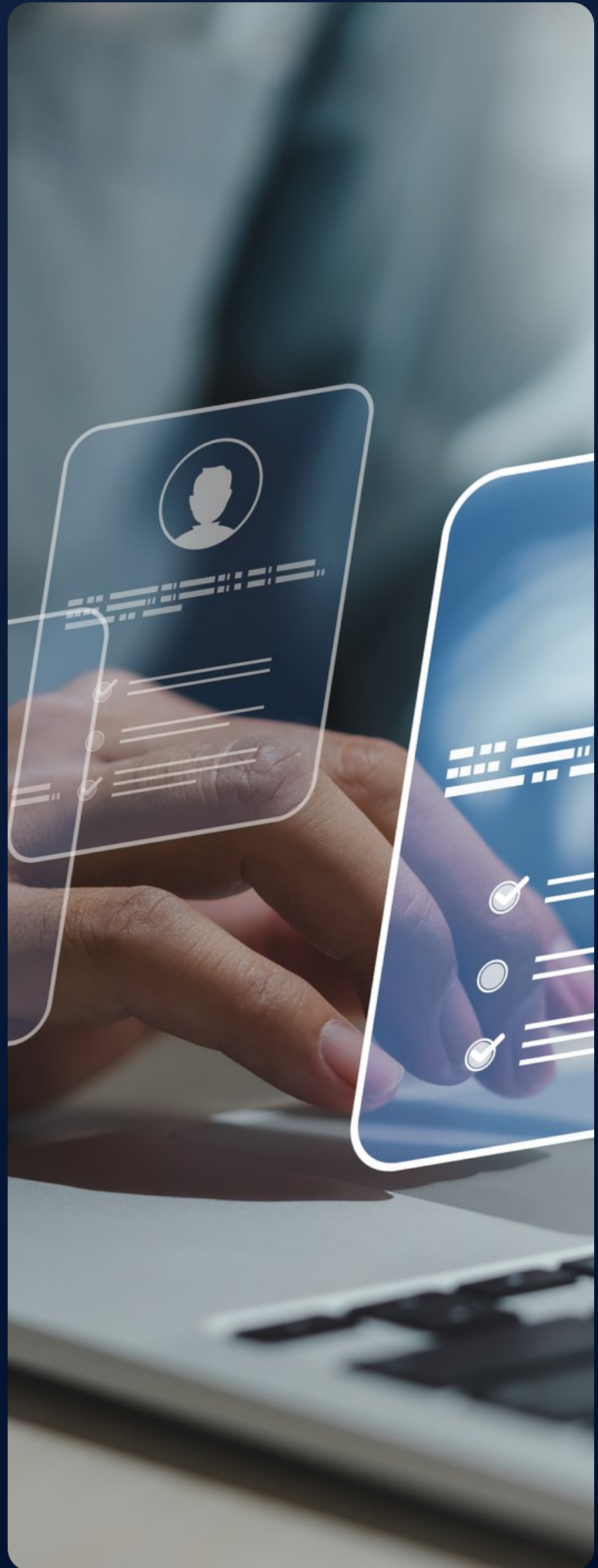
SCHEDULING AND FOLLOW UP

- ☐ Do you manually coordinate meeting times or interviews?
- ☐ Do you send post-meeting or post-purchase follow-up manually?
- ☐ Is there a recurring task that always seems to get forgotten?



CLIENT / CANDIDATE EXPERIENCE

- ☐ Do you rely on team members to remember status updates or touchpoints?
- ☐ Are clients or candidates ever waiting on a response longer than they should?
- ☐ Could a welcome/onboarding sequence be standardized and automated?



REPORTING & NOTIFICATIONS

- ☐ Are you manually building reports from multiple systems?
- ☐ Do you wait for people to email you updates instead of having real-time alerts?
- ☐ Do you chase down tasks or progress updates manually?



Even 1–2 automations can save hours each week.

Let's identify those wins together.

If you checked 5 or more boxes, you have enough to automate — and we can likely deliver quick wins in under 30 days.



Ready to Reclaim 25% of Your Day?

At 4Spot Consulting, we help fast-growing businesses stop wasting time, money, and talent by automating what shouldn't be manual.

Whether you're bogged down by disconnected systems, endless spreadsheets, or high-value employees doing low-value work—**we're here to fix that.**

Our clients have **saved thousands of hours** (and hundreds of thousands of dollars) by implementing our OpsMesh™ Framework, which includes OpsMap™, OpsBuild™, and OpsCare™.

If you're ready to streamline operations, reduce human error, and scale without stress, book your **free Automation Strategy Session** now.

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