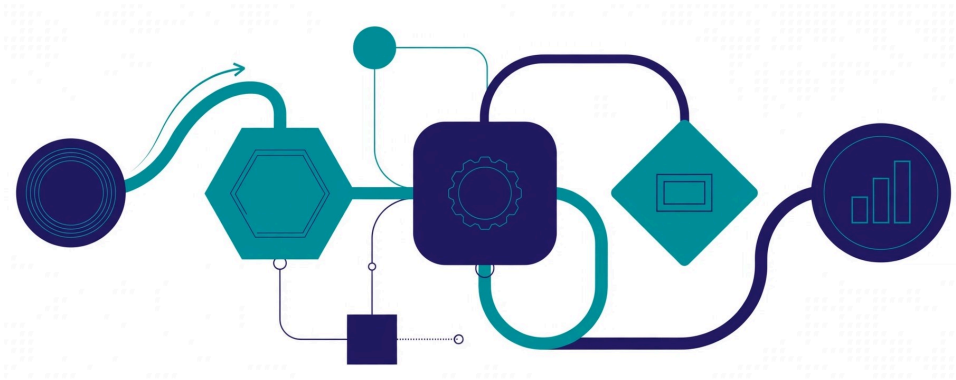
TAPFORGE

FREE SELF-AUDIT • 10 MINUTES • NO FLUFF

SMB Automation Audit

Find where leads, time and money leak out of your client workflow — before you buy another tool.

For agencies, freelancers and small businesses who get enquiries, chase follow-ups, send invoices by hand, and know their systems are held together by memory and inboxes.



25
checks across 5 systems

10 min
to complete honestly

7 days
of fixes that follow

This is an audit, not a guarantee. It will show you gaps and a sensible order to fix them. What you do with it — and the results you get — will vary by business, offer, market and effort.

START HERE

Score yourself honestly. The gaps are the value.

If you polish your answers, you will get a polished score and keep the same leaks. Answer for how your business actually runs on a busy week — not your best week.

How to use this audit

1. **Go section by section.** There are 5 sections, 5 checks each.
2. **Score every check 0, 1 or 2.**
3. **Add each section.** Write the subtotal at the end of the section.
4. **Add all five subtotals** on the score page. That is your score out of 50.
5. **Start with your lowest section** in the 7-day plan — not the easiest one.

Scoring guide
0 — Not in place. It does not happen, or it depends entirely on someone remembering.
1 — Partly in place. It happens sometimes, manually, or only for some clients.
2 — Systemised. It happens every time, automatically or from a clear process anyone can follow.

What you will need

A pen, your phone, and access to your inbox, calendar and invoicing tool. If you cannot find an answer quickly, that is usually a 0 or a 1 — the information itself is scattered.

A note on tools: Tools do not fix a broken process. This audit checks the process first. Later, if a platform is mentioned, it is only as one way to implement a fix — the disclosure on the final page explains how recommendations work.

SECTION 1 OF 5

Lead Capture

Every enquiry should land in one place, with the details you need to respond. If leads arrive in five places, some will be missed in all five.

- [ ] Every channel — website, social, referrals, phone — feeds into **one list or inbox** you check daily. 0 / 1 / 2
- [ ] Your contact / booking form asks for the **information you need to quote or qualify**, not just a name and email. 0 / 1 / 2
- [ ] A new enquiry gets an **instant confirmation** — email, text or message — so the person knows it arrived. 0 / 1 / 2
- [ ] You can see, at a glance, **where each lead came from**. 0 / 1 / 2
- [ ] There is a **clear next step** on every page or profile — book, call, or complete a short form — not just “contact us”. 0 / 1 / 2

Section subtotal: ____ / 10

Red flag: You have found an unanswered enquiry older than a week in the last month — in a spam folder, a DM, or an old inbox. That is not a memory problem. That is a capture problem.

Quick win (20 minutes): List every place an enquiry can arrive. Pick one as the single home for leads. Add a note or auto-forward from every other place into that home today.

SECTION 2 OF 5

Speed-to-Lead & Follow-up

An enquiry is warmest in the first minutes. A careful reply tomorrow competes with a fast reply today from someone else. Follow-up is where most small pipelines quietly leak.

- [ ] A new lead gets a **first personal response within one working hour**, most of the time. 0 / 1 / 2
- [ ] If there is no reply, follow-up happens **automatically or from a scheduled sequence** — not when you remember. 0 / 1 / 2
- [ ] You follow up **at least three times** before marking an enquiry as gone quiet. 0 / 1 / 2
- [ ] Meetings have **automatic reminders and a no-show follow-up**. 0 / 1 / 2
- [ ] Old enquiries are **re-contacted with a reason** — a new offer, a check-in, a useful resource — not left forever. 0 / 1 / 2

Section subtotal: ____ / 10

Red flag: Your follow-up is a single “just checking in” email, sent manually, days later. Most replies come after the first attempt — stopping at one is leaving the conversation unfinished.

Quick win (30 minutes): Write three short follow-up messages today — day 1, day 3, day 7 — helpful, not pushy. Save them as templates you will reuse for every enquiry this week.

SECTION 3 OF 5

Pipeline & CRM

A pipeline is not a spreadsheet of names. It is a shared, current view of who is where, what happens next, and who owns it.

- [ ] Every opportunity sits in **one pipeline with clear stages** — new, contacted, quoted, won, lost — that mean the same thing every time. 0 / 1 / 2
- [ ] Every open opportunity has a **next step and a date**. Nothing sits at “wait and see”. 0 / 1 / 2
- [ ] Contact history — calls, emails, notes, quotes — is **in one record**, not scattered across threads. 0 / 1 / 2
- [ ] You can answer in under a minute: **how many leads, quotes and wins this month?** 0 / 1 / 2
- [ ] Lost deals get a **recorded reason**, so patterns become visible over time. 0 / 1 / 2

Section subtotal: ____ / 10

Red flag: You need to ask a person, search an inbox, or open three spreadsheets to know the status of a single client. If the pipeline lives in someone’s head, it leaves when they do — or when they are busy.

Quick win (25 minutes): Draw your stages on paper, exactly as deals move today. If you cannot name five stages, simplify until you can. Name and date a next step for your five oldest open enquiries.

SECTION 4 OF 5

Payments & Admin Automation

Manual admin does not just cost time. Late invoices, re-typed details and missed renewals quietly delay cash and create errors clients notice.

- [ ] Invoices are created **from the deal or booking**, not re-typed from scratch each time. 0 / 1 / 2
- [ ] Payment reminders go out **automatically** before and after a due date. 0 / 1 / 2
- [ ] Contracts, proposals or onboarding forms use **saved templates** with client details filled in for you. 0 / 1 / 2
- [ ] New clients get a **standard onboarding sequence** — welcome, what to send, what happens next — without manual chasing. 0 / 1 / 2
- [ ] Recurring tasks — reports, check-ins, renewals — are **scheduled by the system**, not held in memory. 0 / 1 / 2

Section subtotal: ____ / 10

Red flag: You are doing the same copy-paste, invoice chase or “please send me…” message more than twice a week. Repetition at that frequency is a template or automation waiting to be built.

Quick win (20 minutes): Time your next invoice from start to sent. Then template it — same layout, same payment wording, same reminder text. You have just documented the automation, even before you automate it.

SECTION 5 OF 5

Reviews, Retention & Referrals

The cheapest next client is usually connected to a happy current one. Without a system, that connection depends on luck and timing.

- [ ] Every happy client is **asked for a review, at the right moment**, with a direct link that makes it easy. 0 / 1 / 2
- [ ] Reviews are **replied to and reused** — on your site, proposals or profiles — with permission where needed. 0 / 1 / 2
- [ ] Past clients hear from you **on a schedule** — useful updates, not only when you need work. 0 / 1 / 2
- [ ] There is a **simple referral ask and a way to track it**, so referrers get thanked properly. 0 / 1 / 2
- [ ] At-risk or quiet clients are **flagged early** — a missed check-in, an ending contract, a long silence. 0 / 1 / 2

Section subtotal: ____ / 10

Red flag: Clients say kind things in calls and emails, but almost none of it appears as a public review or a referral. The goodwill is real — it is just never collected.

Quick win (15 minutes): Message three recent happy clients today. Thank them specifically, link directly to your review page, and ask plainly. Do not batch-blast it — personal asks work because they are personal.

YOUR SCORE

What your score means — and what it does not

Section	Your subtotal
1. Lead Capture	____ / 10
2. Speed-to-Lead & Follow-up	____ / 10
3. Pipeline & CRM	____ / 10
4. Payments & Admin Automation	____ / 10
5. Reviews, Retention & Referrals	____ / 10
TOTAL	**____ / 50**

0–15 — Leaking.

Enquiries and admin are likely slipping through gaps you cannot yet see. Do not buy a big system first. Fix capture and follow-up (Sections 1–2) so nothing new is lost, then build the pipeline underneath it.

16–30 — Patchy.

Some things work — usually because a person makes them work. Your risk is consistency. Systemise your lowest section first, and turn your best manual habit into a template or automation.

31–50 — Systemised.

The basics are in place. Your gains now come from refinement: faster response, better reactivation of old leads, and tighter review and referral loops. Protect what works, and measure before you add tools.

A score is a snapshot, not a verdict on your business. A low score with a clear first fix is more useful than a high score you cannot explain.

7-DAY FIX PLAN

One fix a day. Small, finished, kept.

Do these in order. Each day builds on the last, each should take under an hour, and each stays useful even if you change tools later.

1. **One home for leads.**
   List every enquiry channel. Route them all into one place and check it twice a day.

2. **Instant confirmation.**
   Add an automatic “got it — here is what happens next” message to your main form or booking route.

3. **Three follow-ups, written once.**
   Save day 1, day 3 and day 7 templates. Use them for every open enquiry this week.

4. **Five pipeline stages.**
   Name your stages, move every open deal into one, and give each a next step with a date.

5. **Template your invoice flow.**
   Standard invoice, payment wording and two reminder messages — saved and ready to send.

6. **Ask for the reviews you have earned.**
   Personally ask three happy clients, with a direct review link. Thank every reply.

7. **Review and choose the system.**
   Re-score your lowest section. Write down — in one sentence each — what should happen automatically from now on. That list is your automation brief.

Miss a day? Continue the next day. The plan works because it is finished, not because it is fast.

NEXT STEP — OPTIONAL

You have the leaks. Now fix them in the right order.

You can work the 7-day plan yourself with the tools you already have. That is a complete, honest use of this audit — no purchase is required.

If you want help choosing or setting up a system, this is the point where an all-in-one customer relationship management (CRM) and automation platform can help — for example, a platform like GoHighLevel, which combines pipeline, follow-up, invoicing and review requests in one place. Other platforms can do similar jobs. The right choice depends on your budget, your existing tools and how much you want to manage yourself. Compare before you commit, and use a trial where one is offered.

Affiliate Disclosure: TapForge is a participant in the HighLevel Affiliate Program. If you start a trial or buy through a link labelled "affiliate link" in this document, TapForge may earn a 40% recurring commission on your subscription at no extra cost to you. We recommend tools based on the audit criteria in this document — compare alternatives before you buy. No income or results are guaranteed.

Book a free 30-minute working call

Bring your score. We will map your lowest section to a first fix — whether or not you use any recommended tool.

https://calendly.com/tapforge-proton/30min

Start a GoHighLevel Pro trial (affiliate link):
https://www.gohighlevel.com/pro-trial?fp_ref=sai-e0d8a4

Learn more (affiliate link): https://www.gohighlevel.com/?fp_ref=sai-7369ec

Stay on the TapForge list

This audit was delivered through the TapForge email list (via Buttondown). If someone shared this PDF with you, join the list from the form on the TapForge landing page where you found this audit — that form is how new audits, checklists and fix-plan resources are sent. No separate signup link is printed here, so you always sign up on the current, correct page.

TapForge — practical tools and systems for small businesses. This document is general information about business processes, not financial, legal or tax advice.