

ONE-PAGE DIAGNOSTIC

## Houston SMB AI Workflow Bottleneck Checklist

Use this before booking an audit. If two or more rows are true, the workflow probably has enough repetition and drag to justify a build conversation.

WORKFLOW	BOTTLENECK SIGNAL	QUICK TEST	GOOD FIRST FIX
<b>Quoting</b>	Quotes wait on manual request reading, catalog lookup, or old-file copy/paste.	Pull five recent RFQs. Count how many fields were retyped.	Parse RFQs into a review queue and draft the quote from catalog rules.
<b>Lead response</b>	Good-fit leads wait until someone checks the inbox or form tool.	Look at last week's first-response timestamps.	Capture source, classify fit, and queue a first-response draft.
<b>Follow-up</b>	Open quotes and stale deals depend on memory or a rep's notes.	List every quote older than seven days with no next step.	Generate follow-up drafts from quote status and customer context.
<b>Marketing cadence</b>	Posts and review requests happen in bursts, then stop.	Check the last 60 days for schedule gaps.	Draft posts and review requests from jobs, wins, and customer history.
<b>Internal knowledge</b>	Senior staff answer the same product or process questions repeatedly.	Track repeated questions for one week.	Make approved docs searchable with source-linked answers.
<b>Admin/reporting</b>	Weekly summaries, handoffs, and status updates are rebuilt manually.	Identify reports made from the same sources every week.	Pull source data into a checked draft summary with exception flags.

### PRIORITIZE THE FIRST BUILD

- Repeats weekly       Customer-facing delay       Clear source data       Human review point

### NEXT STEP

Bring the strongest row to the fit call. The audit maps the current workflow, flags risk, and scopes the first build only if the repetition is real enough to automate.