

50 AI Automations Checklist

50 things a growing business can automate today — grouped by where they save you the most time.

Lead Capture & Response

- Auto-reply to every WhatsApp enquiry within seconds
- Instant Instagram DM reply when someone comments a keyword
- Missed-call-to-text: text back anyone whose call you miss
- Web form → instant WhatsApp confirmation to the lead
- Web form → instant alert to your sales team
- Facebook/Meta lead ad → straight into your CRM, no CSV
- Auto-tag leads by source (ad, referral, organic)
- Auto-capture name, phone, and intent before a human replies
- Route hot leads to a human, nurture the rest automatically
- After-hours auto-responder that still books the next step

Qualification

- Ask 3 qualifying questions automatically before booking
- Score each lead by budget, timeline, and fit
- Filter out tyre-kickers before they reach your calendar
- Detect buying intent from the words a lead uses
- Auto-disqualify out-of-area or out-of-budget enquiries politely
- Collect the info your sales team always asks for, up front
- Flag high-value leads for a priority callback
- Confirm the lead is the decision-maker before a call

Follow-up & Nurture

- 5-message follow-up sequence for leads who go quiet
- Reminder before every booked call or appointment
- Re-engage cold leads after 7, 14, and 30 days
- Birthday / renewal / re-order reminders
- Auto-send a case study or proof when a lead hesitates
- Ask for a review automatically after a win
- Win-back sequence for past customers
- Drip educational content to leads who aren't ready yet

Sales & Booking

- Self-serve booking link sent the moment a lead qualifies
- Auto-confirm bookings and add to your calendar
- Reduce no-shows with automatic reminders
- Auto-reschedule instead of losing the lead
- Send a prep message before the call so it's warm
- Quote / proposal auto-generated from a template
- Payment link sent automatically on agreement
- Handover notes auto-created for whoever takes the call

Operations & Admin

- Every lead logged to one sheet or CRM automatically
- Daily summary of new leads to your inbox or WhatsApp
- Auto-create a task when a deal moves stage
- Sync contacts across your tools without copy-paste
- Invoice reminders for unpaid bills
- Auto-file documents and receipts
- Team notification when SLAs are about to be missed
- Weekly performance report, built and sent for you
- Auto-backup of leads and conversations
- Escalate anything a bot can't handle to a human, with context

Content & Growth

- Turn one idea into captions for every platform
- Auto-draft replies to comments and DMs
- Repurpose a long video into short clips + captions
- Schedule a week of posts from one sitting
- Auto-generate ad copy variations to test
- Collect and organise testimonials automatically
- Track which content actually drives enquiries

Want the top 5 built for you, step by step? The full AI Automation Blueprint has the real templates — or message us on WhatsApp to have Outgenix build them.