



FREE · AI QUICK-WIN CHECKLIST

Put AI to work in your business this month.

It starts with small, safe changes that save time or win customers. Tick what you've already done; the rest are your quick wins. Nothing here needs you to learn AI.

1. Customers find you and choose you

- ☐ Your Google Business Profile has correct hours, phone, address, photos and services.
 - ☐ You ask happy customers for a review, with a short link sent by text or WhatsApp.
 - ☐ You reply to every review, good or bad, within a few days.
 - ☐ Your website says plainly what you sell, where you are and how to contact you.
 - ☐ Ask ChatGPT or Gemini "best [your trade] near [your suburb]" and note whether you appear.
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2. Your website sells, not just shows

- ☐ Your home page loads quickly on a phone (test it on mobile data).
 - ☐ A customer can buy, book or enquire in a few taps.
 - ☐ Common questions (price ranges, delivery, returns, hours) are answered on the site.
 - ☐ Enquiries go to one inbox that someone checks every day.
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3. Routine work runs itself

- ☐ You've listed the 3 tasks that eat the most of your week (quotes, emails, rosters, stock).
 - ☐ Repeat replies are saved as templates or drafted by an AI assistant you review.
 - ☐ Invoices and payment reminders go out automatically.
 - ☐ Meeting or supplier notes are summarised into action lists, not left in your head.
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4. You can see what's working

- ☐ You know your weekly sales, enquiries and where they come from.
- ☐ You've written down today's numbers, so you can tell if a change helped.

- ☐ Customer data and logins are protected with strong passwords and two-step sign-in.
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5. Stay safe with AI

- ☐ Don't paste customer personal details or passwords into public AI tools.
- ☐ A person checks anything AI writes before a customer sees it.
- ☐ You approve every change to your systems before it goes live.

Want it done for you? Your free AI-readiness check shows which of these wins matter most for your business, and we can do the work for you. Reply to your results email or write to agent@execx.ai.