THE AUTOMATED SOLO

Automation Readiness Checklist

25 questions · Five minutes · Print it, grab a pen, check the boxes.

HOW TO USE THIS CHECKLIST

Check each box your firm has fully handled. Skip anything outside your practice area. Your score updates automatically in Adobe Reader, or tally manually and check the results section.

1 CLIENT INTAKE

- [ ] 1 New leads can submit information through an online form (not just phone or email).
- [ ] 2 Form submissions automatically create a contact record in your case management software.
- [ ] 3 You have duplicate detection so the same client does not get entered twice.
- [ ] 4 New leads receive an automatic confirmation email or text within 5 minutes.
- [ ] 5 Your intake form uses conditional logic to route different practice areas to different workflows.

SCORED LOW? START HERE:
Playbook: The Zero-Touch Client Intake System
Review: TidyCal Review

2 SCHEDULING & CALENDAR

- [ ] 6 Clients can book consultations directly from your website without calling or emailing.
- [ ] 7 Your booking tool automatically sends calendar invites with meeting details.
- [ ] 8 Clients receive automated reminders 24 hours and 1 hour before their appointment.
- [ ] 9 No-shows automatically trigger a follow-up email or text offering to reschedule.
- [ ] 10 Your calendar blocks off prep time before and after consultations automatically.

SCORED LOW? START HERE:
Review: TidyCal Review

3 DOCUMENT DRAFTING & EMAIL

- 11 You use text expansion or templates for emails you send more than twice a week.
- 12 Engagement letters and retainer agreements generate from templates with client data auto-filled.
- 13 You have saved reply templates for your five most common client questions.
- 14 Court filing cover sheets or routine correspondence pull from client data automatically.
- 15 Your email signature, disclaimers, and disclosures are standardized across all outgoing communication.

SCORED LOW? START HERE:
Playbook: The Consultation-to-Client Pipeline: From Booked Call to Signed Retainer Without the Manual Grind
Review: BunnyDoc Review

4 CLIENT COMMUNICATION

- 16 Past clients receive at least one follow-up email within 90 days of case closure.
- 17 You have an automated drip sequence (2-3 emails) for past client nurturing.
- 18 Your firm sends a regular newsletter or legal update to your contact list.
- 19 You have a system to collect Google reviews or testimonials after case resolution.
- 20 Referral sources are tracked so you know which past clients generate new business.

SCORED LOW? START HERE:
Playbook: The Autopilot Referral Engine
Review: SendFox Review

5 BILLING & FINANCIAL

- 21 Time entries are captured in real time, not reconstructed from memory at end of day.
- 22 Invoices are generated and sent automatically on a set schedule.
- 23 Clients can pay invoices online through a link in the invoice email.
- 24 Overdue invoices trigger an automatic reminder sequence.
- 25 Trust account reconciliation reports run automatically or with a single click.

YOUR SCORE

0 / 25

Check boxes to calculate

21-25 **Advanced**
Highly automated. Focus on AI integration and optimization next.

15-20 **Intermediate**
Strong foundation. Target your weakest category first.

8-14 **Early Stage**
Hours lost weekly. Start with intake and scheduling.

0-7 **Manual**
Most to gain. Pick one playbook and start today.

Calculate your exact annual savings !' theautomatedsolo.com/calculator