

AI Automation Starter Checklist

CrewToolkit · By Jody Rourke · Last updated 2026-10-19 · Built from SBA, FTC and NIST guidance. No specific tool is recommended or was tested.

Quick answer: Start with one boring, repetitive task. Write down every step, check what data it touches, try it on a free or low-cost plan, and keep a person reviewing the output. Time the task before and after, and keep the automation only if it really saves you time. The U.S. Small Business Administration's advice is the same: start small, test free or low-cost tools, and have a person review AI output [1].

How to use this checklist

1. Print it, or copy it into a doc. Use one copy per task you want to automate.
2. Work top to bottom. Don't buy anything before step 4.
3. Tick a box only when you've actually done it.
4. Plans, prices and data terms change. Check each tool's official pricing page and terms on the day you sign up, and write the date down.

Step 1. Pick one repetitive task

- ☐ List 5 tasks you or your team do **every week** that follow the same steps each time (examples from the SBA: sorting email, reminders, meeting notes, templates, routine customer questions [1]).
- ☐ For each, note roughly **how often** it happens and **how long** it takes.
- ☐ Cross out any task where a mistake would be **costly or hard to undo** (payments, legal documents, firing decisions, medical or financial advice).
- ☐ Pick **one** task: frequent, rule-based, digital, and low-risk if it goes wrong.
- ☐ Write the goal in one sentence: "Save time on ___ without lowering quality."

Step 2. Map the task before you touch a tool

- ☐ **Trigger:** what starts it? (a form is submitted, an email arrives, it's Monday 9 a.m.)
- ☐ **Inputs:** what information does it need, and where does it live? (inbox, spreadsheet, CRM, files)
- ☐ **Steps:** write every step in order, including the "obvious" ones.
- ☐ **Decisions:** where does someone use judgment? Mark these. They're where a person should stay in the loop.
- ☐ **Output:** what's the finished result, and who receives it?
- ☐ **Owner:** who's responsible if it breaks?
- ☐ **Baseline:** time the task by hand for a week (fill in the worksheet in Step 7).

Step 3. Check data, privacy and security

- ☐ **Take stock:** list what personal or sensitive data the task touches (customer names, emails, payment or account details, employee records) [2].
- ☐ **Scale down:** remove any data the automation doesn't need. If you don't need it, don't collect or send it [2].
- ☐ **Keep sensitive and proprietary data out of AI tools** wherever you can [1].
- ☐ **Read the vendor's own terms** (privacy policy, terms of service, data processing terms, security or trust page) and write down, with the date: what they do with your data, how long they keep it, whether it's used to train their models, and where it's stored. If the terms don't answer it, ask the vendor in writing or pick another tool.
- ☐ **Turn on multi-factor authentication** for every account the automation uses, and give it access only to what it needs [1] [2].
- ☐ **Know who has access** and how you'll remove it when someone leaves [1][2].
- ☐ **If your small business has an attorney, consider a consultation** [1]. Our suggestion: do it before going live if you're unsure about legal or industry rules for your data.

Step 4. Start with free tiers (and know their limits)

Many AI tools offer basic plans for free or at low cost; the SBA suggests testing them to see if they add value to your business [1].

- ☐ Shortlist 2-3 tools that list the **apps you already use** as supported integrations on their official site.
- ☐ From each official **pricing page**, write down (with the date): plan name, monthly limit (tasks, runs, credits or messages), number of users, and which features are paid only.
- ☐ Check whether it's a **free plan** (no end date) or a **free trial** (ends), and what happens when you hit the limit.
- ☐ Check how to **export** your data and automations if you leave.
- ☐ **Don't enter a card** until the pilot in Step 5 has shown real value.

Step 5. Build a small pilot

- ☐ Build only the **one task** from Step 1, following the vendor's own setup docs.
- ☐ Test with **sample or dummy data** first.
- ☐ Run it **side by side** with your manual process for 1-2 weeks and compare the results.
- ☐ Write a one-page **how it works** note: trigger, steps, accounts used, owner, how to switch it off.
- ☐ Set up an **alert** (email or message) so you know when a run fails.

Step 6. Keep a human in the loop

- ☐ Decide **what a person checks** before anything goes to a customer (accuracy, tone, facts, names, prices) [1].
- ☐ Have **another person review all AI output**, including the messages and outreach AI writes [1]. Our tip: pick someone other than the person who built the automation.
- ☐ Check AI output for **copyright, trademark and accuracy problems** before you publish it [1].
- ☐ Decide whether to **tell customers** how you use AI; the SBA suggests considering a public statement [1].
- ☐ Keep a short **error log**: date, what went wrong, what you changed.

Step 7. Measure time saved (honestly)

	Before (by hand)	After (with automation)
Times per week		
Minutes per run (include review and fixes)		
Minutes per week (times x minutes)		
Setup and upkeep time per week	—	
Monthly cost	\$0	
Errors found this week		

- ☐ **Time saved per week** = before minutes - (after minutes + upkeep). Count review and fix-up time honestly.
- ☐ Is quality the **same or better**? Check the error log.
- ☐ Is the time saved worth the **monthly cost** and the data risk?

Step 8. Decide: keep, fix or switch off

- ☐ **Keep** if it saves real time with the same quality. Put a calendar reminder to review it every 3 months.
- ☐ **Fix** if it's close: change one thing, run another week.
- ☐ **Switch off** if it doesn't save time or adds risk. Cancel any paid plan and delete data you uploaded that you no longer need [2].
- ☐ Have a simple **plan for problems**: who to tell, how to turn it off, and how to check what data was affected [2].
- ☐ Only then pick your **next** task.

Want a deeper framework? NIST's AI Risk Management Framework is a free, voluntary framework for managing AI risks [3].

Disclaimer: This checklist from CrewToolkit is general information, not legal, tax, security or professional advice. It doesn't recommend or endorse any specific product, and we haven't tested any tool for it. Vendor prices, plans and terms change: always check the official vendor pages before you sign up.

Sources

- U.S. Small Business Administration, "Manage your business", section "AI for small businesses" (start small; free or low-cost tools; repeat tasks; risks: human review, intellectual property, sensitive data, customer trust, disclosure; MFA and access under "Strengthen your cybersecurity" on the same page). <https://www.sba.gov/counseling/manage-your-business/#ai-for-small-business> (final URL after redirect; re-fetched and retrieved 2026-10-19)
- Federal Trade Commission, "Protecting Personal Information: A Guide for Business" (take stock, scale down, lock it, pitch it, plan ahead; multi-factor authentication; service provider security). <https://www.ftc.gov/business-guidance/resources/protecting-personal-information-guide-business> (retrieved 2026-10-19)
- National Institute of Standards and Technology, "AI Risk Management Framework" (voluntary framework). <https://www.nist.gov/itl/ai-risk-management-framework> (retrieved 2026-10-19)