FRAMEWORK

Manual Pain Point Checklist

15 min

Put a check for every task you or your team do manually. Then draw a star on the ones that cause the most stress, confusion, or delay. Finally, circle the top 3 pain points to focus on and number them—then tackle each of them one week at a time.

Relationship Management

- [ ] Manually typing in new contacts from forms or events
- [ ] Copying and pasting people from email or social media
- [ ] Forwarding contact info to team members without a system
- [ ] Creating duplicate contacts without realizing it
- [ ] Updating contact info by digging through old emails
- [ ] Searching inboxes or spread-sheets to find conversations
- [ ] Forgetting who last followed up with a potential customer
- [ ] Manually logging calls or notes after meetings

Email & Follow-Up

- [ ] Writing the same follow-up emails from scratch every time
- [ ] Forgetting to send follow-ups after meetings or events
- [ ] Digging through email threads to find past outreach
- [ ] Sending reminders without a schedule or task list
- [ ] Following up at random times (or not at all)

You can't fix what you haven't named.

Decision-Making & Visibility

- [ ] No shared calendar or task view for your team (if you have one)
- [ ] Sales and marketing aren't on the same page for what things mean
- [ ] Can't tell if automations are even turned on (or don't have automation)
- [ ] Unsure what happens after a person submits a form
- [ ] Still asking "Where's that person's/company's info?" too often

Tracking & Reporting

- [ ] Tracking people or opportunities in spreadsheets
- [ ] Manually updating buyer status or changes
- [ ] Not sure where business is coming from
- [ ] Pulling numbers from different systems (email, CRM, social)
- [ ] Can't clearly report on what's working in marketing or sales

Explore fixes here: