

The AI Checklist for Maritime Small Businesses

Find out exactly where you're losing time —
and what to do about it.

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How to Use This Checklist

This checklist is designed for small business owners in New Brunswick and the Maritimes who want to save time without hiring more staff.

Work through each section and check off what applies to your business.

Every box you check is a task that can likely be automated.

By the end, you'll know exactly where to start.

Tip: Print this page and work through it with a coffee. It takes about 5 minutes.

The Checklist

1. Appointment Booking & Scheduling

Time lost: 3–5 hrs/week

Do customers contact you directly to book, confirm, or reschedule?

- I take appointment requests by phone or email
- I manually send confirmation messages to clients
- I call or text reminders before appointments
- I update my calendar by hand after each booking
- I handle rescheduling requests manually
- I don't have a way for customers to book outside business hours

2. Customer Follow-Up & Lead Response

Time lost: 2–4 hrs/week

How quickly does your business respond when someone reaches out?

- I reply to new inquiries manually, often hours later
- I follow up with quotes or proposals by hand
- I have no system to remind me who I haven't heard back from
- Leads sometimes fall through the cracks when I'm busy
- I don't send a thank-you or next-step message after every inquiry
- I rely on memory or sticky notes to track follow-ups

3. Invoicing, Quotes & Payments

Time lost: 2–3 hrs/week

How much time do you spend creating and chasing paperwork?

- I create quotes or invoices manually for each job
- I copy and paste customer info from emails or forms into invoices
- I follow up on unpaid invoices by phone or email
- I don't have automatic payment reminders set up
- Generating a quote takes me more than 10 minutes
- I sometimes forget to invoice until days after a job is done

4. Social Media & Online Presence

Time lost: 1–3 hrs/week

Is your online presence consistent, or does it fall behind when you're busy?

- I post on social media only when I remember to
- I create and schedule posts one at a time, manually
- My posting frequency drops during busy seasons
- I don't have posts planned more than a week ahead
- I spend more than 2 hours a week on social media content

5. Lead Intake & Website Inquiries

Time lost: 1–2 hrs/week

What happens the moment someone fills out your contact form?

- I check my contact form submissions manually
- New leads don't get an automatic response right away
- I copy lead info into a spreadsheet or notebook by hand
- My team isn't always notified immediately when a new lead comes in
- I have no way to track where my leads are coming from
- Some form submissions have gone unanswered

What Your Results Mean

0–5 boxes checked

You're in good shape. A few targeted automations could still save you 2–3 hours a week.

6–12 boxes checked

There's real opportunity here. Automating even half of these tasks could give you back a full workday every week.

13+ boxes checked

Your business is running on manual effort. Automation could save you 6–10 hours every week — that's time you could spend on growth, not admin.

Where to Start

- Step 1** Pick the section where you checked the most boxes. That's your biggest time drain — and your best starting point.
- Step 2** Don't try to automate everything at once. One well-set-up automation is worth more than five half-finished ones.
- Step 3** Book a free 20-minute call with East Coast Virtual Solutions. We'll look at your checklist results and tell you exactly which automation would make the biggest difference for your business — no tech knowledge required.

Ready to get started?

Book your free call at eastcoastvirtualsolutions.com

Or email us at hello@eastcoastvirtualsolutions.com

Less busywork. More business.

Built for Maritime businesses. Based in New Brunswick.

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