EMPIRE BUILDER ACADEMY

MODULE 08 WORKSHEET

AUTOMATE AND SCALE

Fillable worksheet and action checklist. Print it, or type into the DOCX version.

THE ONLINE ENTREPRENEUR BLUEPRINT

From Zero to Your First Online Business

08

BUILD SMART. LAUNCH FAST. SCALE WITH AI.

© 2026 Empire Builder Academy. Educational content only. Not legal, tax, or financial advice. No income or results are promised.

MODULE 8 WORKSHEET: AUTOMATE AND SCALE

Part A: AI Workflow Plan

Workflow	Input	AI step (prompt name)	Human review	Output

Part B: Automation Inventory

Automation name	Trigger	Actions	Apps	Personal data?	Last tested

Part C: Email Marketing Setup

Item	Decision / status
Email tool	
Signup form location(s)	
Welcome sequence (number of emails)	

Item	Decision / status
Newsletter frequency	
Physical mailing address in footer	
Segments	

Part D: Retention

Repeat purchase rate (or estimate): _____%

Retention strategy I'll implement this month: _____

Part E: Operations Hub and SOPs

SOP	Area	Written?	Tested?

Part F: Delegation Audit

Task	Hours/week	Only me / Delegate / Automate / Stop

First role to hire: _____

Part G: Monthly Financial Review

- [ ] Accounts reconciled and transactions categorized
- [ ] P&L reviewed and compared to last month
- [ ] Outstanding invoices checked
- [ ] Upcoming bills and tax payments checked
- [ ] Tax savings and owner's draw transferred
- [ ] Subscriptions reviewed

One financial decision for next month: _____

Part H: KPI Dashboard

Week	KPI 1:	KPI 2:	KPI 3:	KPI 4:	KPI 5:	Notes

Action Checklist

- [ ] Create a prompt library with at least five entries
- [ ] Build and test one no-code automation
- [ ] Start an automation inventory
- [ ] Set up an email tool, signup form, and welcome sequence
- [ ] Schedule your first newsletter
- [ ] Implement one customer retention strategy
- [ ] Create your Operations Hub folder structure
- [ ] Write SOPs for your two most frequent tasks
- [ ] Complete a delegation audit and draft a contractor job post
- [ ] Complete your first monthly financial review

- [ ] Build a 12-week cash flow forecast
- [ ] Choose 5–7 KPIs and start a weekly dashboard