

Top 10 tasks to automate in your business

Tick the tasks you do by hand, estimate the hours, and start with the biggest one.

How to use it

1. Tick every task you currently do by hand.
2. For each one, fill in how many times a week and how many minutes each time. Minutes each time, times how often per week, divided by 60, is your hours per week.
3. Circle the top three by hours. Automate those first, one at a time.
4. Keep the personal parts personal: first sales calls, upset customers, and thank-you notes stay with you.

☐ 1. Replying to new inquiries

The first response to a form, email, or message decides who gets the job.

Tick it if: New inquiries wait hours or days for a reply because you are busy.

Start with: Send an automatic reply within a minute that thanks them, says what happens next, and includes a booking link.

Times per week: _____ Minutes each time: _____ Hours per week: _____

☐ 2. Following up with leads

Most leads need more than one touch, and nobody has time to remember who is due.

Tick it if: You lose track of who you owe a follow-up, or you never send the second message.

Start with: Put every lead in one list, then schedule two or three short follow-ups that stop when they reply or book.

Times per week: _____ Minutes each time: _____ Hours per week: _____

☐ 3. Booking appointments and sending reminders

Scheduling back-and-forth and no-shows cost time on both ends.

Tick it if: You trade several emails to find a time, or clients miss appointments without notice.

Start with: Use a booking page connected to your real calendar, with a confirmation and a reminder 24 hours before.

Times per week: _____ Minutes each time: _____ Hours per week: _____

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4. Onboarding new clients

Welcome message, intake form, folder, kickoff: the same steps every time.

Tick it if: You repeat the same setup for each new client, or skip steps when you are busy.

Start with: Write the steps down in order, then automate the welcome message and one intake form first.

Times per week: _____ Minutes each time: _____ Hours per week: _____

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5. Sending invoices and chasing payments

Late invoices usually come from forgetting to send them, then dreading the reminder.

Tick it if: You send invoices late, or put off the "just checking in" email.

Start with: Turn on automatic payment reminders in the invoicing tool you already use, and add a pay-now link.

Times per week: _____ Minutes each time: _____ Hours per week: _____

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6. Asking for reviews

Happy customers rarely review on their own, and you forget to ask.

Tick it if: You finish good jobs and never ask for a review.

Start with: Send a short text or email a couple of hours after a job is done, with your review link.

Times per week: _____ Minutes each time: _____ Hours per week: _____

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7. Pulling your weekly numbers

Checking three apps to see how the week went takes longer than it should.

Tick it if: You only look at your numbers when you dig through spreadsheets on a weekend.

Start with: Pick four numbers, such as inquiries, calls booked, money in, and money owed, and email them to yourself every Monday.

Times per week: _____ Minutes each time: _____ Hours per week: _____

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8. Copying data between tools

Typing the same details into a form, a spreadsheet, and a CRM invites errors.

Tick it if: You enter the same information in more than one place.

Start with: Connect the two tools you copy between most, so a new entry in one creates a record in the other.

Times per week: _____ Minutes each time: _____ Hours per week: _____

☐ **9. Internal notifications and status updates**

Telling your team that something happened, or asking where something stands.

Tick it if: You answer "did that come in?" and "what is the status?" several times a day.

Start with: Send an automatic message to your team chat or inbox when a form, payment, or booking arrives.

Times per week: _____ Minutes each time: _____ Hours per week: _____

☐ **10. Writing first drafts of routine replies**

Many emails and customer questions have a familiar answer you retype each time.

Tick it if: You answer the same ten questions in slightly different words.

Start with: Use an AI assistant to draft replies from a prompt template, then review each one before it goes out.

Times per week: _____ Minutes each time: _____ Hours per week: _____

Your top three

1. _____ Hours per week: _____

2. _____ Hours per week: _____

3. _____ Hours per week: _____

Hours per week times 52 is the time each one costs you per year. Multiply by what an hour of your time is worth to see what it costs you.