

# 10 Tasks Every Small Business Should Automate

Stop doing these manually — save 10+ hours every week with simple automations you can set up today

Practical Guide • Real Tools • No Code

**10+**

Hours Saved  
Per Week

**\$0**

Starting Cost  
For Most Tools

**30**

Minutes to Set Up  
Your First One

You started your business to do meaningful work — not to spend hours on repetitive tasks. This guide shows you exactly which tasks to automate first, which tools to use (most are free), and how long each one takes to set up.

## 01 Invoice & Payment Reminders

### THE PROBLEM:

You're manually tracking who's paid and who hasn't, then writing follow-up emails one by one. Invoices slip through the cracks, and chasing payments feels awkward.

### THE FIX:

Set up automatic payment reminders that go out on a schedule — 3 days before due, on the due date, and 7 days overdue. The email sounds like you wrote it, but you didn't have to.

QuickBooks, FreshBooks, or Xero (built-in) • Zapier + Stripe for custom setups  
Saves: 2-3 hrs/week • Setup: 20 min

## 02 New Lead / Contact Form Notifications

### THE PROBLEM:

Someone fills out your contact form, but you don't see the email for hours — or it lands in spam. By the time you respond, they've moved on to a competitor.

### THE FIX:

Automatically route new form submissions to your phone (via text or Slack), add the person to your contacts spreadsheet, and send them an instant 'thanks, we'll be in touch' email.

Zapier or Make • Connects your form to Slack, SMS, Google Sheets, and email  
Saves: 1-2 hrs/week • Setup: 15 min

## 03 Social Media Scheduling

### THE PROBLEM:

You know you should post on LinkedIn and Twitter regularly, but you never have time during the week. So it happens inconsistently, or not at all.

### THE FIX:

Batch-create a week's worth of posts on Sunday (use AI to help draft them), then schedule them to go out automatically throughout the week. You stay visible without daily effort.

Buffer (free for 3 channels) • Hootsuite • Use Claude to draft posts from blog content  
Saves: 3-4 hrs/week • Setup: 30 min

## 04 Email Welcome Sequences

### THE PROBLEM:

Someone signs up for your newsletter or downloads a resource, and then... silence. You forget to follow up, they forget about you.

### THE FIX:

Create a 4-email welcome sequence that runs automatically. Email 1: deliver the freebie. Email 2: share a success story. Email 3: teach something useful. Email 4: invite them to book a call.

Mailchimp (free up to 500 contacts) • ConvertKit • ActiveCampaign  
Saves: 2-3 hrs/week • Setup: 45 min

## 05 Appointment & Meeting Scheduling

### THE PROBLEM:

You're playing email ping-pong: 'How about Tuesday?' 'Tuesday doesn't work, what about Thursday?' Three emails later you still don't have a meeting booked.

### THE FIX:

Share a booking link that shows your real availability. The other person picks a time, it goes on both calendars, and they get an automatic reminder before the meeting.

Calendly (free tier) • Cal.com (free, open source) • Google Calendar appointment slots  
Saves: 1-2 hrs/week • Setup: 10 min

## 06 File Organization & Backup

### THE PROBLEM:

Files are scattered across desktops, Downloads folders, email attachments, and random USB drives. Finding the right version of a document takes forever.

### THE FIX:

Set up automatic cloud sync so every file is backed up and organized. Create a naming convention and folder structure. New files automatically go to the right place.

Google Drive or OneDrive (auto-sync) • Zapier to auto-file email attachments  
Saves: 1-2 hrs/week • Setup: 30 min

07

## Customer Feedback & Review Requests

### THE PROBLEM:

You know reviews are important, but asking for them feels awkward and you always forget. Your Google Business page has zero reviews while competitors have dozens.

### THE FIX:

Automatically send a friendly review request email 3 days after a project wraps up or a purchase is made. Include a direct link to your Google or LinkedIn review page.

Mailchimp or Zapier (trigger after project completion) • Google Busi...  
Saves: 1 hr/week • Setup: 20 min

08

## Report Generation & Dashboards

### THE PROBLEM:

Every Monday you spend an hour pulling numbers from different tools, copying them into a spreadsheet, and formatting a report. By the time it's done, you're exhausted.

### THE FIX:

Connect your data sources to an auto-updating dashboard. Sales, expenses, website traffic, leads — all in one place, updated in real time. Open it anytime, no assembly required.

Google Looker Studio (free) • Microsoft Power BI • Notion dashboards  
Saves: 2-3 hrs/week • Setup: 45 min

09

## Employee Onboarding Checklists

### THE PROBLEM:

Every time you hire someone, you're reinventing the wheel — scrambling to remember what accounts to set up, what documents to share, what training to assign.

### THE FIX:

Create a template onboarding workflow. When a new hire starts, trigger it automatically: accounts get created, welcome emails go out, training tasks appear on their to-do list.

Trello or Asana (template boards) • Zapier to trigger account creati...  
Saves: 3-5 hrs/new hire • Setup: 1 hour (one-time)

## 10 Data Entry & Spreadsheet Updates

**THE PROBLEM:**

Someone on your team is manually typing data from emails, forms, or PDFs into a spreadsheet. It's boring, error-prone, and takes hours every week.

**THE FIX:**

Use automation to pull data directly from its source into your spreadsheet. Form responses, email data, invoice details — all flow automatically into the right cells.

Zapier or Make • Google Sheets integrations • AI tools like Claude...

Saves: 3-5 hrs/week • Setup: 30 min

### Total Potential Time Saved:

# 15 - 25+ hours per week

That's like hiring a part-time employee — but it works 24/7 and never calls in sick.

## Not Sure Where to Start?

Every business is different. What should be automated first depends on where you're losing the most time and money right now.

Book a free 30-minute consultation with JD Singh. He'll look at your specific situation and map out your top 3 automation wins —

[Click Here to Book Your Free Call](#)

# Quick Reference: Your Automation Cheat Sheet

Pin this page to your wall. Start from the top and work your way down.

#	Task	Best Tool	Setup	Saves	Cost
01	Invoice Reminders	QuickBooks / FreshBooks	20 min	2-3 hrs	Free-\$\$
02	Lead Notifications	Zapier + Slack	15 min	1-2 hrs	Free
03	Social Scheduling	Buffer	30 min	3-4 hrs	Free
04	Email Welcome Seq.	Mailchimp	45 min	2-3 hrs	Free
05	Meeting Scheduling	Calendly	10 min	1-2 hrs	Free
06	File Organization	Google Drive / OneDrive	30 min	1-2 hrs	Free
07	Review Requests	Zapier + Mailchimp	20 min	1 hr	Free
08	Auto Dashboards	Looker Studio / Power BI	45 min	2-3 hrs	Free
09	Onboarding Checklists	Trello / Asana	1 hr	3-5 hrs*	Free
10	Data Entry	Zapier + Sheets	30 min	3-5 hrs	Free

\* Per new hire • \$\$ = Paid software (typically \$10-30/month)

## Recommended Priority Order

Not sure which to tackle first? Here's our suggested order based on impact vs. effort:

- Start today** Meeting Scheduling (#5) — literally takes 10 minutes
- This week** Lead Notifications (#2) + Social Scheduling (#3) — quick wins
- Next week** Invoice Reminders (#1) + Email Welcome (#4) — revenue impact
- This month** File Org (#6) + Dashboards (#8) + Data Entry (#10) — big time savers
- When you hire** Onboarding Checklists (#9) + Review Requests (#7) — as needed

### Want a personalized automation plan for YOUR business?

Book a free 30-minute consultation with JD Singh — click below or visit [fermat.com](https://fermat.com)

**Book Now:** [calendly.com/fermat-solutions](https://calendly.com/fermat-solutions)