Business Automation Checklist

15 everyday tasks small businesses can hand to AI

Tick the tasks your business still does by hand. Each tick is a candidate for AI or automation. Start with the one that takes the most time every week.

Customer communication

- [ ] Common questions answered with saved, AI-drafted replies
- [ ] Enquiries from website forms collected in one sheet
- [ ] Follow-up reminders for leads who did not reply

Sales & billing

- [ ] Daily sales summary generated from your spreadsheet
- [ ] Invoice and payment reminder messages drafted automatically
- [ ] Monthly report with charts prepared by AI

Documents & admin

- [ ] Long documents summarised before meetings
- [ ] Standard letters and quotations created from templates
- [ ] Files named and organised consistently

Marketing

- [ ] Monthly content calendar planned with AI
- [ ] Product descriptions written and checked
- [ ] Customer reviews analysed for common themes

Operations

- [ ] Stock levels checked and low-stock alerts sent
- [ ] Staff schedules planned
- [ ] Repetitive data entry replaced by forms + automation

Next step

Choose ONE task, write down how long it takes today, automate it, and measure again after two weeks. Small wins build confidence. SteryTech can help you plan and build these workflows — visit sterytech.in/contact-us.