

FREE GUIDE · 2026 EDITION

25 Tasks Your Small Business Can Automate with AI

A practical checklist for owners and managers. Tick the tasks your team still does by hand, then start with the ones you ticked most often.

How to use this checklist

You don't need to automate everything. Most businesses get the biggest win from one or two well-chosen automations. Go through the 25 tasks below and tick every one your team still does manually today.

1. Tick

Mark each task that takes your team time every week.

2. Pick one

Start with the task that is frequent, repetitive and follows clear rules.

3. Measure

Note the hours saved in the first month, then add the next automation.

Customer communication

Answer faster without hiring more people.

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|--|---|-----------------|--------------------------|
| 01 | Answer every phone call, 24/7 | AI RECEPTIONIST | ☐ |
| An AI receptionist picks up, answers common questions, books appointments and passes urgent calls to a person. | | | |
| 02 | Reply to website questions instantly | WEBSITE CHATBOT | ☐ |
| A chatbot trained on your own website answers frequent questions day and night. | | | |
| 03 | Send an instant reply to new enquiries | AUTOMATION | ☐ |
| Every form, email or message gets a friendly reply within a minute, with a link to book. | | | |
| 04 | Collect reviews after each job | AUTOMATION | ☐ |
| A short message goes out automatically after a completed job, asking for a review. | | | |
| 05 | Summarise long emails and call notes | AI ASSISTANT | ☐ |
| AI turns long threads and call transcripts into a short summary with next actions. | | | |

Sales and leads

Stop letting good leads go cold.

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|---|--|--------------|--------------------------|
| 06 | Add new leads to your CRM automatically | AUTOMATION | ☐ |
| Website forms, calls and emails create a contact in your CRM without copy and paste. | | | |
| 07 | Follow up with leads who go quiet | AUTOMATION | ☐ |
| A sequence of polite reminders goes out until the lead replies or books. | | | |
| 08 | Score and sort incoming leads | AI ASSISTANT | ☐ |
| AI reads each enquiry and tags it by service, urgency and budget so you call the best ones first. | | | |
| 09 | Draft quotes and proposals | AI ASSISTANT | ☐ |
| AI drafts a first version from your price list and the customer's request, ready for your review. | | | |

- 10 Alert your team about hot leads** **AUTOMATION** ☐
- A text or chat alert reaches the right person the moment a high-value enquiry arrives.
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Scheduling and operations

Remove the back-and-forth from your day.

- 11 Let customers book online** **AUTOMATION** ☐
- Customers pick a free slot themselves; it lands in your calendar with all the details.
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- 12 Send appointment reminders** **AUTOMATION** ☐
- Automatic reminders by text or email reduce no-shows.
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- 13 Fill cancelled slots** **AUTOMATION** ☐
- When someone cancels, the next person on a waiting list is offered the slot.
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- 14 Create jobs and tasks from bookings** **AUTOMATION** ☐
- A new booking creates the job, checklist and assignment for your team.
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- 15 Answer staff questions from your documents** **AI ASSISTANT** ☐
- An internal AI assistant answers 'how do we...' questions from your own policies and manuals.
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Marketing and content

Stay visible without spending your evenings writing.

- 16 Draft social media posts** **AI CONTENT** ☐
- AI writes a week of posts from your services, offers and recent jobs, for you to approve.
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- 17 Turn one article into many posts** **AI CONTENT** ☐
- One blog post becomes several social posts, an email and a short video script.
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- 18 Write your monthly newsletter** **AI CONTENT** ☐
- AI pulls together news, tips and offers into a ready-to-send draft.
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- 19 Reply to common social comments** **AUTOMATION** ☐
- Platform tools answer frequent questions automatically and flag the rest for you.
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- 20 Create product and service descriptions** **AI CONTENT** ☐
- AI drafts clear, search-friendly descriptions in your tone of voice.
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Finance and reporting

See your numbers without building spreadsheets.

- 21 Send invoices and payment reminders** **AUTOMATION** ☐
- Invoices go out when a job is marked complete; polite reminders follow if unpaid.
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|---|---|--------------------------|
| 22 | Read receipts and bills AI ASSISTANT | ☐ |
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| 23 | Build a weekly KPI report AI DASHBOARD | ☐ |
| <hr style="border: 0; border-top: 1px solid #ccc; margin: 5px 0;"/> | | |
| 24 | Get plain-English summaries of your numbers AI DASHBOARD | ☐ |
| <hr style="border: 0; border-top: 1px solid #ccc; margin: 5px 0;"/> | | |
| 25 | Spot unusual changes early AI DASHBOARD | ☐ |

Want help choosing your first automation?

Book a free 30-minute call and we'll look at your ticked tasks together and recommend where to start. worknovaai.com/book-a-call