

The Complete Business Automation Checklist

50+ automation opportunities to save time, reduce errors,
and scale your operations

How to use this checklist:

1. Go through each section relevant to your business
2. Check boxes for processes you currently do manually
3. Star (★) the ones causing the most pain
4. Focus on automating your starred items first

Each checked item represents potential time savings of 2-10+ hours per week.

1. Lead Management & Sales

Automate your sales pipeline to never miss an opportunity

- Lead capture from website forms → CRM
- Automatic lead scoring based on behavior
- Lead assignment to sales reps (round-robin or rules-based)
- Welcome email sequences for new leads
- Follow-up reminders for untouched leads
- Lead source tracking and attribution
- Meeting scheduling (calendar integration)

- Proposal/quote generation
- Contract/e-signature workflows
- Win/loss notifications to team

■ **Quick Win:** Automating lead response alone can increase conversions by 25-50%. Speed matters.

2. Customer Communication

Keep customers informed without manual effort

- Order confirmation emails
- Shipping/delivery notifications
- Appointment reminders (email + SMS)
- Payment receipt generation
- Invoice sending and reminders
- Review/feedback requests (post-purchase)
- Birthday/anniversary messages
- Re-engagement campaigns for inactive customers
- Support ticket acknowledgment
- Status update notifications

■ **Quick Win:** Automated appointment reminders reduce no-shows by 30-50%.

3. Document Processing

Let AI handle the paperwork

- Invoice data extraction
- Receipt processing and categorization
- Contract review and key term extraction
- Form data entry to database
- Document classification and routing
- PDF generation from templates
- Document approval workflows

- Signature collection and tracking
- Compliance document monitoring
- Report generation and distribution

■ **Quick Win:** *AI document processing is 10-100x faster than manual data entry with 95%+ accuracy.*

4. Financial Operations

Automate the numbers that run your business

- Invoice creation and sending
- Payment reminders and collections
- Expense categorization
- Bank reconciliation
- Financial report generation
- Budget vs. actual alerts
- Payroll processing triggers
- Tax document preparation
- Subscription/recurring billing
- Refund processing workflows

■ **Quick Win:** Automated invoice reminders can reduce DSO (days sales outstanding) by 15-30 days.

5. HR & Employee Operations

Streamline people processes

- Job posting to multiple boards
- Application screening and scoring
- Interview scheduling
- Offer letter generation
- Onboarding task sequences
- Time-off request workflows
- Expense report routing
- Performance review reminders
- Training assignment and tracking
- Offboarding checklists

■ **Quick Win:** Automated onboarding ensures nothing falls through the cracks and gets new hires productive faster.

6. Marketing Automation

Scale your marketing without scaling your team

- Social media scheduling and posting
- Email marketing campaigns
- Lead nurture sequences
- Content distribution workflows
- Ad performance alerts
- Campaign reporting dashboards
- A/B test result tracking
- UTM parameter management
- Influencer outreach tracking
- Event registration workflows

7. Data & Reporting

Get insights without manual number crunching

- Daily/weekly KPI reports
- Sales pipeline summaries
- Customer health score updates
- Inventory level alerts
- Website traffic reports
- Competitive monitoring alerts
- Data backup verification
- Error/exception logging
- System health dashboards
- Cross-system data sync

■ **Quick Win:** Automated reporting saves 5-20 hours per week for most businesses.

Calculate Your Automation ROI

Quick formula to estimate your potential savings

Step 1: Count checked items above: _____ items

Step 2: Estimate average hours/week per item: _____ hrs

Step 3: Multiply: Items × Hours = _____ total hours/week

Step 4: Multiply by your hourly labor cost: × \$ _____ /hr

Step 5: Multiply by 52 weeks: × 52

= Your Annual Automation Opportunity: \$ _____

Most businesses find \$50,000 - \$500,000+ in annual savings potential.

Prioritization Matrix

Focus on high-impact, low-effort automations first

	LOW EFFORT	HIGH EFFORT
HIGH IMPACT	■ DO FIRST Quick wins with big results	■ PLAN Worth the investment Schedule these
LOW IMPACT	■ EASY WINS Do when you have spare cycles	■ SKIP Not worth the effort

Ready to Automate?

Option 1: DIY with No-Code Tools

Start with Zapier, Make, or n8n for simple automations. Good for basic workflows.

Option 2: Get Expert Help

For complex automations, custom integrations, or AI-powered processes, working with specialists saves time and ensures reliability.

We can help. High Performance Online builds custom automation solutions that handle the complex stuff no-code tools can't.

■ **Book a free consultation:** cal.com/highperformance

■ **Email us:** hello@highperformanceonline.com

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