

Low-Hanging Fruit

The everyday office chores worth automating first

Every one of these follows the same shape: **a scheduled trigger, an automatic draft, and a human who still reviews and sends.** Hour figures are typical starting estimates for a small owner-operated business — re-run them with the client's own numbers before quoting.

RECURRING COMMUNICATIONS ~14 hrs/mo

- **Monthly newsletter** — drafted from the month's photos, hires and posts, 5 days before month-end **4 hrs**
- **Review requests** — personalized ask 3 days after the invoice is paid **3 hrs**
- **Weekly customer follow-up** — a "how did we do" note per job closed last week **3 hrs**
- **Google Business post** — short local post drafted each Tuesday from recent work **3 hrs**
- **Dormant customer reactivation** — quarterly pull of anyone quiet 12 months, note per person **1 hr**
- **Birthday & anniversary touches** — monthly milestone list with notes already written

THE FRONT DESK ~7 hrs/mo + saved deals

- **Instant inquiry response** — every form and email answered in 2 minutes, booking link attached
- **Confirmations & reminders** — texts at 48 hours and 2 hours out, replies routed to a person **4 hrs**
- **Cancellation backfill** — a slot opens, the waitlist gets texted in order
- **After-hours voicemail triage** — transcribed, tagged urgent or routine, reply drafted by 7am **3 hrs**
- **Recurring service scheduling** — 11 months on, the maintenance outreach writes itself
- **Lead source reporting** — where every lead came from and what it cost per closed job

HIRING & COMPLIANCE ~6 hrs/mo

- **Job posting draft** — written in the owner's voice, ready for Indeed and Facebook
- **Applicant screening summary** — a paragraph per resume against your must-haves **4 hrs**
- **New hire day-one packet** — forms, handbook, first-week schedule, intro email
- **License & cert expirations** — employee and manager both nudged 60 days out
- **Insurance & permit renewals** — tracked at 90 / 30 / 7 days with documents gathered
- **Timesheet chase** — Friday nudge, Monday summary of who's still missing **2 hrs**

GETTING MONEY IN THE DOOR ~24 hrs/mo

- **Quote & estimate drafting** — inquiry becomes a draft estimate from your price list **8 hrs**
- **Unpaid invoice nudges** — weekly aging list, reminders pre-written at the right firmness **7 hrs**
- **Receipt capture & filing** — photograph it: renamed, categorized, filed, logged **4 hrs**
- **Proposal follow-up sequence** — check-ins for day 3, 10 and 21 unless won or lost **3 hrs**
- **Friday money snapshot** — in, out, outstanding, biggest overdue account **2 hrs**
- **Vendor price-change watch** — flags any line item billed above your recorded cost

PAPERWORK & REPORTING ~24 hrs/mo

- **Inbox triage** — sorted today / this week / FYI / junk, routine replies pre-drafted **10 hrs**
- **Job-site photo notes** — photos in, draft job report and customer write-up out **5 hrs**
- **Monthly owner dashboard** — revenue, jobs, leads, close rate, reviews, what changed **5 hrs**
- **Meeting notes** — decisions, owners, deadlines, plus the follow-up email **4 hrs**
- **Contract & lease reading** — key dates, renewal windows, anything unusual flagged
- **SOP capture** — talk through a task for 5 minutes, get a written procedure

FILES, DATA & PIPELINE ~4 hrs/mo

- **Attachment filing** — saved to the right client folder, named consistently **2 hrs**
- **Duplicate contact cleanup** — weekly scan surfaced for one-click merge
- **Incident & safety reports** — verbal description in, formatted report out and filed
- **Referral partner check-ins** — quarterly note to each source with what they've sent you **2 hrs**
- **Competitor & market watch** — monthly summary of local pricing and new entrants
- **Board or membership report** — quarter's activity drafted for the director to edit

THE QUESTION THAT BUILDS THIS LIST FOR YOU

"What do you do the last three days of every month?"

Then keep pulling: What's the last thing you do on Friday before you leave? · What did you do last week that you'd never let a new hire touch? · Which task gets pushed to Saturday morning? · If someone quit tomorrow, whose chores would quietly stop happening?

Learn. Practice. Master.

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