

THE SMALL BUSINESS OWNER'S CHECKLIST

15 Tasks You Should *Stop Doing Manually*

The hidden time-drains quietly costing you leads, revenue, and your weekends — and the simple automations that handle each one for you.

WHY THIS MATTERS

The Hidden Cost of "I'll Just Do It Myself."

Every manual task feels small in the moment. Added up, they're the reason you're working nights and still feel behind.

Copying lead info. Chasing quotes. Remembering to send reminders. Asking for reviews. None of it is hard — but all of it is **time you're not spending growing the business**, and every one is a chance for something to slip.

Worse, manual means inconsistent. The follow-up you forget is the lead you lose. The review you didn't ask for is the customer who never vouched for you. The reminder you skipped is the no-show that wrecked your afternoon.

Here's the good news: nearly every repetitive task in a small business can be **automated once** and then run on its own — quietly, consistently, forever. You set it up; it works while you sleep.

How to Use This Checklist

On the next three pages are 15 tasks most small businesses still do by hand. For each one, check the box if **you're still doing it manually**. Be honest — no one's watching. Then add up your checks and find your score on the last page. It'll tell you exactly how much time and money you're leaving on the table.

Capturing & Converting Leads

Lead Capture & Response

1 Responding to new leads

Manual: you reply "when you get to it" — sometimes hours later, after they've already called a competitor.

Automated: an instant auto-reply to the lead + a notification to your team the second a form comes in.

2 Following up on missed calls

Manual: a missed call is a missed customer who won't call twice.

Automated: a text fires automatically — "Sorry we missed you! How can we help?" — within seconds.

3 Booking appointments

Manual: five emails just to find a time that works.

Automated: a booking link lets them self-schedule; you both get confirmations.

Sales & Pipeline

4 Following up on quotes & estimates

Manual: you send it once, get busy, and the deal quietly dies.

Automated: a timed follow-up sequence keeps nudging until they reply yes or no.

5 Tracking where every deal stands

Manual: it lives in your head, your inbox, and a few sticky notes.

Automated: a visual pipeline shows every lead's stage and moves them along automatically.

Closing & Keeping Customers

Sales & Pipeline (cont.)

- 6** **Sending proposals & contracts** □
Manual: rebuild the doc, attach it, then chase the signature for a week.
Automated: templated proposals with e-signature and automatic reminders until it's signed.
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Customer Communication

- 7** **Appointment reminders** □
Manual: no-shows eat your calendar and your income.
Automated: text + email reminders go out before every appointment, cutting no-shows.
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- 8** **Asking for reviews** □
Manual: you forget to ask, so you stay invisible online while competitors rack up stars.
Automated: a review request sends itself after every completed job.
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- 9** **Reactivating past customers** □
Manual: years of old customers sit in a spreadsheet, doing nothing.
Automated: a reactivation campaign wins back dormant buyers — this exact system sold one client **20 vehicles in 60 days**.
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- 10** **Renewal & rebooking nudges** □
Manual: customers lapse quietly and you never notice until revenue dips.
Automated: timed "time to rebook" reminders bring them back on schedule.
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Running the Business

Onboarding & Admin

- I1 Onboarding a new client**
Manual: a slightly different scramble every single time.
Automated: a consistent onboarding sequence — welcome, forms, and what happens next — sends itself.

 - I2 Invoice & payment reminders**
Manual: chasing payments is awkward, slow, and easy to put off.
Automated: invoices and polite payment reminders go out on their own, on schedule.

 - I3 Collecting info & documents**
Manual: you chase clients for files and details over and over.
Automated: an intake form with auto-reminders until everything's submitted.
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Marketing

- I4 Posting on social media**
Manual: posting live, whenever you remember, which means rarely.
Automated: schedule a month of content in one sitting and let it publish itself.

 - I5 Staying in touch with your list**
Manual: you email past customers "when there's time" — so basically never.
Automated: a newsletter or nurture sequence keeps you top of mind automatically.
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YOUR RESULTS

Add Up Your Checks.

However many boxes you checked, that's how many times a week (or a day) something is depending on you to remember it. Here's what your number means:

0-3

Ahead of the pack. You've automated the basics. Tighten the last few gaps and you're running a real system.

4-8

Leaking time & leads. You're busy doing what software should do. A few automations would pay for themselves fast.

9-15

You ARE the system. Be honest — that's not sustainable. It's costing you growth, focus, and your weekends.

Not sure where to start? Automate these 3 first.

1. **Instant lead response** — the single highest-ROI automation. Speed-to-lead wins deals.
2. **Review requests** — more 5-star reviews means more trust and more inbound, on autopilot.
3. **Customer reactivation** — the fastest revenue you'll ever find is in customers you already have.

Each of these can be live in days, not months — and once they're running, they don't stop. That's the difference between working *in* your business and building one that works for you.

LET'S BUILD IT FOR YOU

Want these running *without lifting a finger?*

Ezra Solutions builds automation systems for small businesses — lead response, reminders, reviews, reactivation, and more. You tell us what's eating your time; we build the system that handles it, done for you.

[Book a Free Strategy Call →](#)

ezrasolutions.net/services/automation

"Whatever you do, work at it with all your heart, as working for the Lord." — Colossians 3:23