

What Can You Actually *Automate*?

Not everything needs a human—and not everything needs to be on your plate at all. Before you hire, or before you hand one more thing to your team, it's worth asking which of your recurring tasks could simply *run themselves*. Work through the areas below and flag anything you do over and over again.

Rule of thumb: if it happens more than a few times a week and follows the same steps every time, it can almost certainly be automated.

THE AUTOMATION AUDIT

01

Email & Inbox Triage

Are you sorting, labeling, and replying to the same kinds of messages by hand every day?

e.g. routing inquiries to the right place, sending your standard FAQ reply, flagging the messages that actually need you.

→Automate it if you send near-identical replies more than a few times a week.

02

Lead Intake & Follow-Up

Do new leads sit waiting because the first reply depends on you?

e.g. instant replies to form submissions, nurture sequences, “just checking in” follow-up, reminders.

→Automate it if a lead has ever gone cold while waiting on you.

03

Scheduling & Calendar

Still trading “what time works for you?” emails back and forth?

e.g. self-booking links, confirmations, no-show reminders, easy reschedules.

→Automate it if booking a single call takes more than one message.

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04

Data Entry & App-to-App Busywork

Are you the human bridge copying information from one tool into another?

e.g. moving form data into a CRM or spreadsheet, syncing contacts, updating statuses across apps.

→Automate it if you retype or copy-paste the same data between two tools.

05

Invoices, Receipts & Documents

Building the same documents from scratch every time?

e.g. generating invoices, sending contracts, assembling onboarding packets, logging receipts.

→Automate it if you're rebuilding a template instead of filling one in.

06

Content & Social Posting

Does posting and repurposing content eat hours of your week?

e.g. scheduling posts, turning one piece of content into many, drafting first-draft captions.

→Automate it if "post it everywhere" regularly costs you an afternoon.

07

Reporting & Recurring Updates

Pulling the same numbers into the same report on a schedule?

e.g. gathering metrics, formatting the summary, sending the weekly or monthly recap.

→Automate it if you build the same report more than once.

ready when you are —

Let's put your busywork on autopilot.

Every checkmark is time you're spending on something a system could quietly handle in the background. Building those workflows — and the AI behind them — is exactly what I do. Let's map out which ones to automate first.

Let's Talk →

In the meantime, check out my **free** calculator tool to see what your busywork is costing you.



Calculator Tool