



The SME Automation Checklist

20 tasks you should automate today, across finance, sales, customer support, and operations.

5 hrs

saved per week,
owners (median)

11.5 hrs

saved per week,
employees

20

tasks covered
in this checklist

Time-savings source: Zapier, 2024 State of Business Automation.

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How to use this checklist

Work through each category and tick the tasks you or your team are still doing by hand. You do not need to automate all 20, and most businesses shouldn't try. Use this as a prioritisation tool instead.

1

Tick what applies

Go through all four categories and mark every task still done manually.

2

Count per category

Add up your ticks in each category. The highest score is your starting point.

3

Note the pain

Circle any task that caused a real problem recently: a missed payment, a lost lead.

4

Start with one

Automate the category with the most ticks, rather than one task at a time.

A note on the time savings

Figures shown are typical ranges for an established SME, not guarantees. They assume a normal working week where admin competes with everything else, and where a five-minute task routinely takes twenty because of interruptions and context switching.

Finance

Tasks 1-5

More than half of businesses spend over 10 hours a week on invoice processing alone.

☐ 01 Invoice sending

1-2 hrs/week

Manual Drafting and sending each invoice by hand once a job or deal closes.

Automated The invoice generates and sends itself the moment a deal is marked complete.

☐ 02 Payment reminders

2-3 hrs/week

Manual Tracking due dates yourself and writing a reminder each time a client runs late.

Automated A three-stage sequence fires at day 7, 14 and 21 without anyone remembering.

☐ 03 Receipt matching

1-2 hrs/week

Manual Matching each receipt to the right transaction line at month end.

Automated A photographed receipt is read, categorised and matched automatically.

☐ 04 Expense categorisation

~1 hr/week

Manual Sorting every expense into the right category for your accountant by hand.

Automated Expenses are categorised automatically as they are captured.

☐ 05 Cash flow reporting

2-3 hrs/month

Manual Pulling numbers from several places into a spreadsheet every week or month.

Automated A live dashboard updates itself, so the current picture is always ready.

Sales & Leads

Tasks 6-10

Leads contacted within five minutes are 21x more likely to qualify than those contacted after 30.

☐ 06 Lead acknowledgement

21x qualify rate

Manual An enquiry sits in an inbox until someone has a free moment to reply.

Automated An instant acknowledgement goes out within seconds, while interest is fresh.

☐ 07 Follow-up sequences

2-3 hrs/week

Manual Remembering to follow up on day 1, 3 and 7, which stops by week two.

Automated The sequence runs on schedule regardless of how busy the week gets.

☐ 08 Lead scoring

1-2 hrs/week

Manual Guessing which of today's enquiries are worth calling first.

Automated Leads are scored on behaviour and fit, so the best ones surface first.

☐ 09 CRM data entry

~2 hrs/week

Manual Typing new contact details into the CRM by hand after every enquiry.

Automated Form and call data flow straight into CRM records with nothing retyped.

☐ 10 Meeting scheduling

1-2 hrs/week

Manual A back-and-forth email chain trying to find a time that suits both sides.

Automated A booking link shows real availability and confirms in one step.

Customer Support

Tasks 11-15

AI assistants resolve 80-90% of routine customer questions without human help.

☐ 11 FAQ answering

80-90% resolved

Manual Answering the same handful of questions over and over, across email and chat.

Automated An AI assistant trained on your documentation answers instantly, day or night.

☐ 12 Ticket routing

1-2 hrs/week

Manual Reading each incoming ticket and forwarding it to whoever should handle it.

Automated Tickets are categorised and routed to the right person automatically.

☐ 13 Satisfaction surveys

30-60 mins/week

Manual Remembering to send a survey after each resolved query, often skipped.

Automated The survey goes out automatically the moment a case closes.

☐ 14 Review requests

~1 hr/week

Manual Manually asking happy customers to leave a review, when someone remembers.

Automated A review request goes out automatically after a positive interaction.

☐ 15 Onboarding emails

1-2 hrs/week

Manual Writing and sending welcome and setup guidance to each new customer.

Automated A personalised onboarding sequence triggers the moment someone signs up.

Operations

Tasks 16–20

Manual data entry carries a documented error rate of 1–4% per field entered.

☐ 16 Document generation

3 hrs to 10 mins

Manual Drafting each proposal or contract from scratch, typically 2–3 hours each.

Automated A first draft generates from CRM data in under 10 minutes.

☐ 17 Appointment confirmations

~38% fewer no-shows

Manual Calling or texting each client individually to confirm and remind them.

Automated A three-touch sequence (booking, 24 hrs, 2 hrs) runs itself.

☐ 18 Data sync between tools

2–4 hrs/week

Manual Re-typing the same information into a second system after entering it once.

Automated Data flows between connected tools without anyone retyping it.

☐ 19 Report creation

1–2 hrs/week

Manual Pulling figures from several tools into a deck every reporting period.

Automated The report builds itself on a schedule from live, connected data.

☐ 20 Social media posting

1–2 hrs/week

Manual Logging into each platform separately to publish and time every post.

Automated Content is scheduled once and posted automatically at the right time.

Your score

Count your ticks in each category and write the totals below. The highest number is where your business is losing the most time right now.

Finance

Most relevant: Invoice & Cash Flow Automation

 / 5

Sales & Leads

Most relevant: Lead Capture & Nurture System

 / 5

Customer Support

Most relevant: AI Customer Support Assistant

 / 5

Operations

Most relevant: Smart Appointment System / Document Automation Hub

 / 5

Not sure where to start?

The 2-Minute Assessment asks six questions about your business and returns a personalised recommendation, with full pricing attached. No call required.

Take the 2-Minute Assessment

zopply.com/products/

Every ZOPPLY product publishes its setup fee and monthly cost upfront. See the full catalogue at zopply.com/products/.