

FREE GUIDE

5 Workflows Every Small Business Should Automate First

A practical checklist for owners who know they're wasting time on repetitive tasks but aren't sure where automation actually pays off first.

Start with the task, not the technology

Most small businesses don't need an "AI strategy." They need three or four specific, repetitive tasks off their plate. The trick is picking the right ones first — the tasks that are both high-frequency and low-judgment, where a person is mostly just moving information around rather than making a real decision.

This checklist covers the five workflows we see pay off fastest for small businesses, roughly ordered by how quickly they tend to save real time. Check off the ones that sound familiar — that's usually where to start.

The checklist

1

Lead and inquiry routing

New leads come in through your website, email, and maybe a form or two, and someone manually reads each one and decides what happens next. An automation reads, sorts, and routes them into your CRM or inbox automatically — nothing sits unread overnight.

2

Appointment scheduling and reminders

If your team spends time on the phone or in email threads just finding a time that works, or chasing no-shows, this is one of the fastest wins — automated scheduling links and reminder sequences pay for themselves within the first month.

3

Invoice and payment follow-up

Chasing overdue invoices is repetitive, low-judgment, and easy to automate — a sequence that reminds clients automatically, and flags a human only when someone genuinely needs a real conversation.

4

Data entry between tools

If the same information gets typed into two or three different systems — a new customer in your CRM, then your invoicing tool, then a spreadsheet — that's pure copy-paste labor an automation can eliminate entirely.

5

Recurring reports and summaries

The weekly sales summary, the monthly expense report, the status update you send the same way every time — if the underlying data already lives in a system you use, this can be generated and even drafted automatically.

How to use this list

Pick the one item above that made you think "yes, that's us" the fastest — that's usually the highest-leverage place to start, not the biggest or most ambitious one. Small, working automations beat big unfinished ones every time.

Want help doing this?

DataStack builds AI-powered automations for small businesses — the free audit below covers exactly the workflows in this checklist, scoped to your actual tools and team. No obligation, just a clear picture of what's worth automating first.

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