

Small Business Automation Checklist 2026

Identify what to automate first – and what tools to use

Most small businesses automate nothing until they're drowning. This checklist covers the 6 highest-ROI automation categories for service businesses. Work through each section, check off what you already have, and the gaps are your priority list. According to McKinsey, up to 30% of tasks in most small businesses can be automated with current technology – the question is which ones to do first.

01 Lead & Inquiry Handling

Saves 5-10 hrs/week

- New inquiry triggers instant auto-reply (within 5 min)
Tools: n8n, Zapier, Make
- Booking/discovery call link sent on first contact
Tools: Calendly, Acuity Scheduling
- Unqualified leads routed separately from hot leads
Tools: HubSpot workflows, n8n
- Lead source is captured and tagged in CRM automatically
Tools: HubSpot, Pipedrive, Zoho
- Follow-up sequence runs if lead doesn't book (3-5 emails)
Tools: ActiveCampaign, Keap, Mailchimp
- Lead source attribution tracked (form, chat, referral, ad)
Tools: GA4, HubSpot, CRM tags

02 Client Onboarding

Saves 3-6 hrs/client

- Contract sent automatically after verbal agreement
Tools: PandaDoc, DocuSign
- Invoice or payment link triggered by signed contract
Tools: Stripe, QuickBooks, LawPay
- Client added to project management tool automatically
Tools: ClickUp, Notion, Asana
- Intake form delivered immediately after contract signed
Tools: Typeform, Jotform + n8n
- Welcome email with next steps sent automatically
Tools: Mailchimp, ActiveCampaign, n8n
- Internal Slack/Teams notification when new client onboards
Tools: Slack, n8n webhook

03 Scheduling & Reminders

Reduces no-shows 25-30%

- Appointment reminders sent 24h and 1h before
Tools: Calendly, Acuity, GReminders
- Post-appointment follow-up sent automatically
Tools: ActiveCampaign, n8n
- Recurring service reminders scheduled in advance
Tools: n8n scheduled workflows
- Rescheduling handled without staff involvement
Tools: Calendly, Acuity
- New appointment triggers job prep checklist for staff
Tools: ClickUp, Asana + Zapier
- Calendar sync across team members and locations
Tools: Google Calendar, Calendly Teams

- Invoice generated and sent automatically after job completion
Tools: QuickBooks, Stripe, FreshBooks
- Payment confirmation triggers next workflow step
Tools: Stripe webhooks + n8n
- Recurring invoices set up for retainer/subscription clients
Tools: Stripe subscriptions, QuickBooks
- Payment reminder sequence for overdue invoices
Tools: QuickBooks automation, n8n
- Invoices synced to accounting software automatically
Tools: QuickBooks, Xero, Wave
- Sales data synced to accounting without manual export
Tools: Zapier, n8n, native integrations

05 Reviews & Referrals

3-5x review volume

- Google review request sent 24-48h after job completion
Tools: n8n + Gmail, Podium, Birdeye
- Referral ask triggered 30 days after positive experience
Tools: n8n scheduled trigger
- Review monitoring alerts when new review is posted
Tools: Google Alerts, Podium
- Review request sent via SMS (higher open rate than email)
Tools: Twilio, SimpleTexting + n8n
- Negative feedback routed to owner directly (not public)
Tools: n8n conditional workflow
- Anniversary/seasonal re-engagement email to past clients
Tools: ActiveCampaign, Mailchimp

06 Internal Operations

Saves 4-8 hrs/week

- Weekly KPI report generated and emailed automatically
Tools: n8n + Google Sheets, Notion
- Low inventory or supply alert sent to manager
Tools: n8n + inventory system
- Contract renewals flagged 30 days before expiration
Tools: n8n + CRM date triggers
- New staff onboarding triggered by HR system add
Tools: n8n, BambooHR, Gusto
- End-of-day summary report to owner/manager
Tools: n8n scheduled workflow
- Customer data backed up and synced across tools
Tools: n8n, Zapier, native sync

07 Estimated Time Savings by Category

Category	Weekly Time Saved	Primary Benefit	Difficulty
Lead & Inquiry Handling	5-10 hours	Faster response = more bookings	Low
Client Onboarding	3-6 hrs per client	Fewer delays, better first impression	Medium
Scheduling & Reminders	2-4 hours	Fewer no-shows, less back-and-forth	Low
Invoicing & Payments	3-5 hours	Faster collections, less chasing	Low-Medium
Reviews & Referrals	1-2 hours	More Google reviews without asking manually	Low
Internal Operations	4-8 hours	Less manual reporting and coordination	Medium

