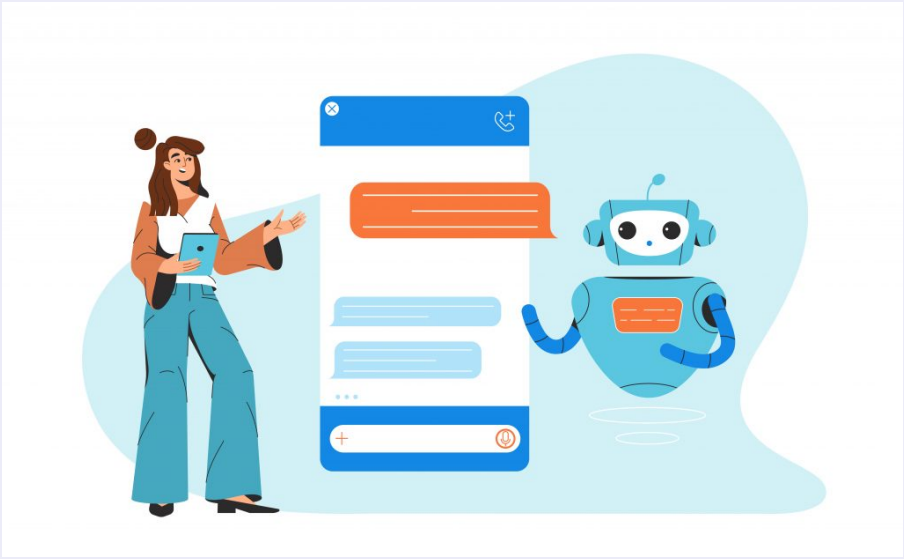
Worksheet: How to Automate Repetitive Tasks Using AI

Step-by-step automation guide for small business owners



Running a small business often means doing everything yourself — replying to customers, creating content, sending invoices, following up on leads, and managing daily operations. Many of these tasks are repetitive and time-consuming. This worksheet helps you identify which tasks can be automated using simple AI tools and shows you step-by-step how to implement automation without overwhelming yourself or your team.

Instead of working longer hours, you'll work smarter. Ready to **dreamBIG** in 2026? This worksheet will help you save time, reduce errors, and build a more efficient business using AI.

Part 1: Identify Repetitive Tasks

Before automating, you must identify what is consuming your time.

Which tasks do you repeat daily or weekly?

☐ Replying to customer enquiries
☐ Creating social media captions
☐ Sending follow-up messages
☐ Preparing invoices
☐ Updating sales records
☐ Posting on social media
☐ Sending payment reminders
☐ Tracking leads in notebook/Excel
☐ Writing emails
☐ Creating quotations

Other repetitive tasks in my business:

Which 3 tasks take the most time?

Part 2: Choose What to Automate First

Do not automate everything at once. Start small.

Circle one priority area:

☐ Customer Communication
☐ Social Media & Marketing
☐ Sales Follow-ups
☐ Accounting & Bookkeeping
☐ Order & Inventory Management

My first automation focus area:

Part 3: Step-by-Step Automation Plan

Follow these simple steps:

Step 1: Select One Simple AI Tool

Examples:

- ChatGPT for writing replies and captions
- Canva for automated social media designs
- WhatsApp Business auto-replies
- Zoho Books or Vyapar for invoicing
- HubSpot/Zoho CRM for tracking leads

Tool selected:

Step 2: Start with One Task Only

Task I will automate this week:

Example:
“Create 10 ready-made WhatsApp reply templates.”

Step 3: Create Templates

Use AI to generate:

☐ Customer enquiry replies
☐ Pricing explanation
☐ Follow-up message
☐ Payment reminder
☐ Social media captions
☐ Email response templates

Templates created (list):

Step 4: Set Up Automation

☐ Enable WhatsApp auto-reply
☐ Schedule social media posts
☐ Use CRM for lead tracking
☐ Use accounting app for invoices
☐ Set follow-up reminders

Automation activated on (date):

Step 5: Test for 7 Days

Track:

- Time saved
- Errors reduced
- Faster response time
- Improved consistency

Part 4: Expected Benefits

After automating repetitive tasks, you should notice:

☐ 5–10 hours saved per week
☐ Faster response to customers
☐ More consistent follow-ups
☐ Fewer manual errors
☐ Better professionalism
☐ More time for sales & strategy

Which benefits are most important to you?

Part 5: Weekly Automation Tracker

Week: _____

Task Automated
Tool Used
Time Spent Before
Time Spent After
Benefit Noticed

Part 6: 30-Day Automation Roadmap

Week 1: Automate communication

Week 2: Automate content creation
Week 3: Automate sales follow-ups
Week 4: Automate invoicing & reporting

My 30-day focus plan:

Week 1: _____
Week 2: _____
Week 3: _____
Week 4: _____

Part 7: Automation Checklist

Before starting:

☐ I selected only one task
☐ I chose a simple tool
☐ I created templates first
☐ I tested before full implementation

After 30 days:

☐ I saved at least 10+ hours
☐ I reduced manual mistakes
☐ My response time improved
☐ My follow-ups became consistent
☐ I feel more organized

Part 8: Quick Automation Tips

Start small: Automate one task per week
Use templates: Save responses and reuse
Do not automate broken processes
Review every 30 days
Train one team member at a time
Measure time saved, not just tool usage

Plan Smart. Automate Gradually. Grow Confidently.

Automation is not about replacing people — it is about reducing repetitive work so you can focus

on growth, customer relationships, and strategy.

Small improvements in automation can create big improvements in productivity and profitability.

Use this worksheet every month to identify new tasks to automate. Step-by-step automation means less stress, more control, and better business outcomes.

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Generated on : 13-October-2026