

Automation starter checklist

The first ten things to automate, in order.

Work down the list. Do one at a time, check it works for a couple of weeks, then move on.

#	Automate	What it replaces
☐ 1	Missed-call text-back	Calling people back hours later, or never.
☐ 2	Online booking with reminders	Phone tag to find a time, and reminder calls.
☐ 3	Quote follow-ups	Remembering to chase every estimate.
☐ 4	Review requests after each job	Asking in person, if at all.
☐ 5	Invoices from the job record, paid online	Typing invoices and waiting on checks.
☐ 6	Payment reminders	Awkward calls about overdue bills.
☐ 7	Leads into one list	Copying form emails and voicemails into a spreadsheet.
☐ 8	Confirmations and on-my-way texts	Texting each customer by hand.
☐ 9	Syncing customers between tools	Retyping the same details in two or three places.
☐ 10	A weekly numbers summary	Pulling figures together by hand, or not at all.

Keep a person in the loop for anything a customer sees until you trust it. Questions? hello@sentientpartners.ai