TCHAMBA · CONSULTING & SOLUTIONS

10 tasks to automate in a small business

Tick the tasks that exist in your business, estimate how much time they take each week, then use the grid on page 2 to choose your first project. Time needed: 15 minutes.

	Task	Signs it is time	Possible automation	h / week
☐	**1. Invoicing and payment reminders**	Invoices created by hand, reminders forgotten	Invoices generated from your data, automatic reminders	
☐	**2. Booking and appointment reminders**	Calls and emails to confirm or reschedule	Online booking, automatic confirmations and reminders	
☐	**3. Copy-pasting between software**	The same information typed 2 or 3 times	Tools connected through APIs, synchronization	
☐	**4. Timesheets and payroll**	Spreadsheets sent by email, calculation errors	Mobile entry, approval and export to payroll	
☐	**5. Reports and dashboards**	A report rebuilt by hand every week	Automatically updated dashboard	
☐	**6. Sorting emails and requests**	Overflowing shared inbox, lost requests	Automatic sorting and routing, acknowledgements	
☐	**7. Paper or PDF forms**	Printed forms typed in again	Online forms connected to your tools	
☐	**8. Filing documents**	Time lost looking for a contract or a file	Automatic filing, information extraction (AI)	
☐	**9. Answering frequent questions**	The same questions asked every day	Internal or public AI assistant, with human validation	
☐	**10. Onboarding new employees**	Accounts, access and documents handled case by case	Onboarding journey and automated access creation	

Choosing your first project

A good first project is frequent, painful and simple to automate. Place each ticked task in the grid:

HIGH GAIN · LOW EFFORT

Do first

Quick, visible result: ideal to get started.

HIGH GAIN · HIGH EFFORT

Plan it

Split into steps, after a first success.

LOW GAIN · LOW EFFORT

If time allows

Small improvements to group together.

LOW GAIN · HIGH EFFORT

Avoid

The cost outweighs the benefit.

Measuring the time actually lost

1. For one week, note each time the task is done and how long it takes.
2. Multiply by 48 weeks to get the yearly time.
3. Multiply by the person’s loaded hourly cost to estimate the yearly cost.
4. Compare this cost with the price of the automation: that is your return on investment.

Before automating: 3 precautions

- List the personal data involved (Quebec Law 25) and who needs access to it.
- Keep human validation for important decisions.
- Start small, measure the gain, then expand.

Want to talk about it?

Free 30-minute assessment: we look at your tasks together and I suggest 2 or 3 concrete options, with a written summary.

tchamba.ktmasolutions.com/en/diagnostic-gratuit