

Top 5 Automation Opportunities for Small Businesses

Save time, reduce repetitive work, and simplify everyday business processes.

1

Stop typing the same information twice

Information arrives once and goes where it needs to go.

2

Send routine emails and reminders automatically

The right message goes out when something happens.

3

Let AI read simple documents for you

Key details are pulled out of invoices, forms and PDFs.

4

Keep approvals from getting stuck

Requests reach the right person and get followed up.

5

Stop rebuilding the same reports

Reports and dashboards update themselves.



Your Data Stays Protected

Right Information. Right Person. Right Access.

- We design solutions so company data is handled through approved business systems and services.
- Users only see information they are authorized to access, and the company's existing permissions are respected.
- When supported Microsoft business AI services are used, company prompts, responses, and business content are protected and are not used to train public AI models.

How do you know what can be automated? Look for tasks that repeat often and follow the same steps; copy information from one place to another; send the same emails, reminders or updates; wait on someone to approve; or involve reading the same kinds of documents again and again.

1. Stop typing the same information twice

Does someone copy names, emails, dates or other details from a form or email into Excel, SharePoint, a CRM or another system?

WHAT AUTOMATION CAN DO

When the information arrives, it can be saved in the right place automatically and the right person can be notified.

Example: Customer fills out a form → information is saved → team gets a notification.

Why it helps: less typing • fewer mistakes • faster response

2. Send routine emails and reminders automatically

Do you send the same confirmation, reminder, status update or follow-up message over and over?

WHAT AUTOMATION CAN DO

Send the right message when something happens, without someone having to remember every time.

Example: Form submitted → confirmation email. Document missing for 3 days → reminder email.

Why it helps: faster follow-up • fewer missed messages • more consistent service

WHERE AI CAN HELP

AI can help write or personalize a message. Your team can still review important messages before they are sent.

3. Let AI read simple documents for you

Do you open invoices, forms, applications or PDFs just to find the same few details?

WHAT AI CAN DO

AI can read the document, pull out key information and pass it to your workflow.

Example: Invoice arrives → AI reads invoice number and total → information is saved → reviewer is notified.

Why it helps: less manual reading • less copying • faster processing

4. Keep approvals from getting stuck

Does work stop because someone is waiting for a manager, owner or customer to approve something?

WHAT AUTOMATION CAN DO

Send the approval to the right person, remind them if needed, record the decision and notify everyone when it is done.

Example: Expense submitted → manager approves → employee is notified → status is updated.

Why it helps: less waiting • clear status • fewer follow-up emails

A good rule for AI

Use AI for reading, writing, summarizing or sorting information. Keep a person involved when the decision needs judgment.

5. Stop rebuilding the same reports

Do you collect numbers from several places, update a spreadsheet and create the same report every week or month?

WHAT AUTOMATION CAN DO

Bring information together automatically and keep a dashboard or report up to date.

Example: Sales or task data changes → dashboard updates → manager sees the latest numbers.

Why it helps: less report preparation • easier tracking • faster decisions

Which task should you start with?

Choose a task that:

- Happens often.
- Follows the same steps.
- Takes time but little judgment.
- Causes delays, missed follow-ups or repeated data entry.

A good place to start: ask, *"Why are we still doing this manually?"*

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