FREE STEP-BY-STEP GUIDE

Find your first automation in 5 days

Count what your team retypes for one week, then build the top item the week after.

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WHY THIS MATTERS

Why start with retyping

Most small businesses pick their first automation by gut feel. The one that should come first is usually hiding in plain sight: information your team already has and types in again somewhere else.

A new client's details go from the web form into the CRM, then into the accounting tool, then into the project board. Hours from the timesheet get typed into an invoice. Each move follows a rule nobody has to think about.

That makes retyping the safest place to start. The data already exists, the rule never changes, a mistake shows up within a day, and the time saved is easy to count.

START HERE TODAY

Create the tally sheet with the five columns in step 1 and send it to the team with the message in step 2. That is the whole job for today.

THE RESULT

What you'll end up with

A shared sheet that shows where your team's retyping time goes, and the top item from it running as an automation with a named owner. No new software is needed for the count.

BEFORE YOU START

What you need

- A shared spreadsheet everyone on the team can edit.
- 5 working days of normal work.
- The tools you already pay for. Many CRMs, form builders and accounting tools connect to each other in their settings.
- About 1 to 3 days of someone's time in week 2 to build the winner.

THE STEPS

Count it, pick it, build it

01 Set up the tally sheet

Make a shared sheet with five columns. Each row is one time someone copied information from one tool into another.

> COPY THIS
>
> From | To | What | Minutes | Who
> Web inquiry form | CRM | New client contact details | 5 | Office manager

You'll know it worked when the sheet is shared and everyone who touches client data can add a row.

02 Tell the team what it is for

People log every row when they know the sheet will take work off their week. Say that plainly.

> COPY THIS
>
> For the next 5 working days, add a row to this sheet every time you copy information from one tool into another. A rough guess at the minutes is fine. This is to find tool problems, so we can take that work off your week.

You'll know it worked when rows start arriving on day 1.

03 Run it for 5 working days

Leave it alone. Remind people once, midweek. Do not judge rows as they come in.

You'll know it worked when you have 5 days of rows from everyone who handles client data.

04 Group the rows and total the minutes

Group every row by its From and To pair. Add up the minutes for each pair. An AI assistant can do the sorting if you paste the rows in, but you choose the winner.

You'll know it worked when you have a short list of tool pairs, each with a total.

05 Pick the winner

The pair with the most total minutes is your first candidate. If two pairs are close, pick the one with the fewest people involved, because it will be easier to test. If the winner touches money, build it with a review step: the automation drafts, a person approves.

From	To	Rows	Minutes
Web inquiry form	CRM	14	70
Signed engagement letter	Practice management tool	6	60
Timesheets	Invoice draft	22	110
CRM	Welcome email	6	30
Client email	Shared task list	31	95

An example tally from a 12-person accounting firm, for illustration. Timesheets to invoices wins on minutes, and since it touches money it gets a review step. The web form to CRM pair is the safer pick for a first win with no review step at all. The tally makes that choice visible.

You'll know it worked when you can name one pair and say why it won.

06 Write the rule in one sentence and name an owner

The rule is the automation. Name one person who owns it from day 1, because a broken connection with no owner can run for weeks before anyone notices.

> COPY THIS
>
> When [trigger] happens, create [record] in [tool] with [fields].
> Owner: [name]

You'll know it worked when the sentence is specific enough that someone else could build it.

07 Check for a built-in connection first

Look in the settings of both tools. A built-in connection is cheaper to run and easier to maintain. Where there is none, a connector tool such as Zapier or Make links two apps with a trigger and an action.

You'll know it worked when you know which tool will carry the automation.

08 Build it and test it on 5 records

Create 5 test records yourself and run them through. Check every field landed where it should.

You'll know it worked when all 5 test records arrive complete and in the right fields.

09 Turn it on with a week of checks

Switch it on for live data. The person who used to do the retyping checks every record it creates for one week. If the week is clean, they drop to a weekly spot check of 5 records.

You'll know it worked when a full week passes with no fixes needed.

WHERE PEOPLE GET STUCK

Snags and fixes

Nobody logs anything. The message did not say why. Send the step 2 message again and say what you will do with the results.

Two pairs tie. Pick the one with fewer people involved. It is easier to test and easier to own.

The winner moves money. Build it anyway, with a review step. The automation drafts the invoice or payment and a person approves it.

The data arrives as messy free text. An AI step can pull out the name, service and deadline before the automation files it. Send its output to a review queue for the first few weeks, because the extraction will sometimes guess.

AFTER THE FIRST ONE

What to automate next

Once the first one has run for 2 to 4 weeks without a fix, move down this list. Each step creates a little more new content than the one before it, and new content is where automations go wrong.

Order	What to automate	Example
1	Retyping between tools	Form entries into the CRM
2	Reminders and follow-ups	Overdue invoice reminders
3	Documents from templates	Engagement letters, onboarding packs
4	Intake routing	New inquiries to the right person
5	AI drafting with review	First draft of a client update

Leave these until the simpler steps are running:

- Anything that moves money with no review.
- Work that changes each time. Write the process down first.
- A process two people do differently. Agree on one way first.

The full reasoning behind this order is in **What to automate first in a small business**.

DONE LOOKS LIKE

- [ ] The tally ran for 5 days and every pair has a total.
- [ ] One pair was chosen, with a reason you can say in a sentence.
- [ ] The rule is written in one sentence and has a named owner.
- [ ] The automation passed 5 test records and a full week of checked live use.
- [ ] A weekly spot check of 5 records is on someone's calendar.

NEXT STEP

The tally finds one automation. The audit finds all of them.

The AI Readiness Audit maps how work moves through your business and puts every fix in order, starting with the ones that cost the most hours. You get the plan before anything gets built.

Book a 30-minute call

Or read how the audit works at **davidjforer.com**