TwoIT Solutions

# Checklist: 5 tasks you can automate today

Check the ones you do. Start with the one that costs you the most time; one is enough to feel the difference.

- [ ] **Reply instantly to every new lead**

**Today:** You answer when you see the message.
**Automated:** An automatic message with your booking link, within seconds.
**With what:** Your CRM, WhatsApp Business or a form with an automatic reply.

- [ ] **Log every lead in one place**

**Today:** You copy names and phones into Excel.
**Automated:** The form saves the lead straight into your sheet or CRM.
**With what:** Google Forms + Sheets, your CRM, or connectors like Zapier or Make.

- [ ] **Ask for pending documents**

**Today:** You chase with messages, one by one.
**Automated:** An automatic reminder every 2 days until they send it.
**With what:** Templates and reminders in your CRM, or scheduled emails.

- [ ] **Remind people of appointments**

**Today:** Appointments get forgotten or missed.
**Automated:** A reminder 24 hours and 1 hour before each appointment.
**With what:** Google Calendar, Calendly or your CRM.

- [ ] **Follow up with people who didn't reply**

**Today:** You remember when you can.
**Automated:** Scheduled messages on day 1, 3 and 7.
**With what:** CRM sequences or scheduled emails.