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10 Business Processes You Should Automate with AI

2-minute read. Hours saved every week.

You know AI can help. You just don't know where to start.

This checklist identifies the 10 most commonly automatable processes in an SMB. Check the ones that exist in your company, count your boxes, and discover your potential.

What this checklist does not replace: a full process audit. But it's an excellent first step.

1 Sales Proposal Generation

SALES

THE PROBLEM

Your sales team spends 2-4 hours per proposal. Pull CRM data, customize Word templates, check pricing, format.

WHAT AI CHANGES

An AI workflow generates a complete proposal in under 10 minutes. Client data, history, pricing — all injected automatically.

REAL-WORLD EXAMPLE

A manufacturing SMB went from 3 hours to 8 minutes per proposal — 12 hours reclaimed per week.

 This process exists in my company

Estimated gain : 8-15 h/week

2 Lead Qualification and Scoring

SALES

THE PROBLEM

Leads come from multiple channels. Manual qualification is slow and criteria vary between reps.

WHAT AI CHANGES

An AI system analyzes each lead, cross-references data, and assigns priority scores.

REAL-WORLD EXAMPLE

A B2B firm reduced lead processing time by 40% and increased conversion by 15%.

 This process exists in my company

Estimated gain : 3-6 h/week

3

Meeting Prep and Follow-up Notes

SALES

THE PROBLEM

Before meetings: dig through CRM, emails, notes. After: write summary, update CRM.

WHAT AI CHANGES

AI compiles pre-meeting briefs and generates structured follow-up notes automatically.

REAL-WORLD EXAMPLE

A business owner reclaimed 45 minutes per day by automating prep for 3-4 daily meetings.

 This process exists in my company**Estimated gain : 30-60 min/day****4**

Document Processing and Filing

ADMIN

THE PROBLEM

Invoices, purchase orders, contracts: someone receives, reads, extracts data, enters, and files. Every day.

WHAT AI CHANGES

AI reads documents, extracts structured data, pushes to your management tool, and archives properly.

REAL-WORLD EXAMPLE

A 50-person SMB: 30 seconds per invoice instead of 8 minutes for 200 invoices/month.

 This process exists in my company**Estimated gain : 20-40 h/month**

ADMIN

5 Repetitive Email Responses

ADMIN

THE PROBLEM

30-50% of incoming emails call for a near-identical response. Yet someone handles them one by one.

WHAT AI CHANGES

An AI assistant analyzes, categorizes, and drafts responses. Email processing time drops by half.

REAL-WORLD EXAMPLE

An office manager went from 2h/day on email to 45 minutes.

This process exists in my company

Estimated gain : 1-2 h/day

6 Leave and Absence Management

ADMIN

THE PROBLEM

Time-off requests by email, chat, in person. Tracking in spreadsheets. Conflicts discovered too late.

WHAT AI CHANGES

AI workflow centralizes requests, checks balances and conflicts, notifies managers.

REAL-WORLD EXAMPLE

An 80-person SMB eliminated 6 hours/week of HR admin work.

This process exists in my company

Estimated gain : 4-8 h/week

MARKETING

7

Marketing Content Creation

MARKETING

THE PROBLEM

Blog posts, LinkedIn, newsletters: 4-6 hours per article between research, writing, editing, formatting.

WHAT AI CHANGES

AI produces structured first drafts. Your team goes from blank page to review mode.

REAL-WORLD EXAMPLE

A SaaS SMB went from 2 articles/month to 8, without hiring.

This process exists in my company

Estimated gain : -60-70% time

8

Reporting and Dashboards

MARKETING

THE PROBLEM

Every Monday: open 4 tools, export CSVs, copy-paste, build charts, email the report.

WHAT AI CHANGES

An automated pipeline collects data and generates reports automatically.

REAL-WORLD EXAMPLE

A marketing director eliminated 3 hours of weekly reporting.

This process exists in my company

Estimated gain : 2-5 h/week

OPERATIONS

9

Tier-1 Customer Support

OPERATIONS

THE PROBLEM

Same questions keep coming. Support team spends 40-60% of time on FAQ-level requests.

WHAT AI CHANGES

A conversational AI answers frequent questions instantly and routes complex cases.

REAL-WORLD EXAMPLE

An e-commerce business redirected 55% of tier-1 tickets to AI.

This process exists in my company

Estimated gain : 40-60% tickets

10

Project Planning and Tracking

OPERATIONS

THE PROBLEM

Updates lost between email, Slack, meetings. PM spends more time chasing info than managing.

WHAT AI CHANGES

AI centralizes updates and generates automatic progress summaries.

REAL-WORLD EXAMPLE

A 12-person team reduced status meeting time by 30%.

This process exists in my company

Estimated gain : 3-6 h/week

Summary

#	PROCESS	DEPARTMENT	ESTIMATED GAIN	<input type="checkbox"/>
1	Sales Proposal Generation	Sales	8-15 h/week	<input type="checkbox"/>
2	Lead Qualification and Scoring	Sales	3-6 h/week	<input type="checkbox"/>
3	Meeting Prep and Follow-up Notes	Sales	30-60 min/day	<input type="checkbox"/>
4	Document Processing and Filing	Admin	20-40 h/month	<input type="checkbox"/>
5	Repetitive Email Responses	Admin	1-2 h/day	<input type="checkbox"/>
6	Leave and Absence Management	Admin	4-8 h/week	<input type="checkbox"/>
7	Marketing Content Creation	Marketing	-60-70% time	<input type="checkbox"/>
8	Reporting and Dashboards	Marketing	2-5 h/week	<input type="checkbox"/>
9	Tier-1 Customer Support	Operations	40-60% tickets	<input type="checkbox"/>
10	Project Planning and Tracking	Operations	3-6 h/week	<input type="checkbox"/>

Total : ___ / 10

Your score

0-3 boxes checked

Early Stage

Your company has few mature processes ready for automation. A 2-hour AI workshop will identify opportunities specific to your business.

4-6 boxes checked

Significant Potential

Several processes consume daily time and energy. Start with a workshop, then consider an AI audit. ROI typically visible within 3 months.

7-10 boxes checked

High Potential

Your company is full of automatable processes. Take action now with an AI audit. Cumulative gains can represent 1-2 full-time salaries.

Turn those checked boxes into an action plan.

Our 2-hour AI Workshop analyzes your actual processes and defines the first implementation steps.

[Book an AI Workshop →](#)

Scored 7+? Our AI Audit identifies the 5-10 best opportunities in 1-2 days.
[Request an audit → hello@piwa.one](mailto:hello@piwa.one)

About PIWA

AI automation consulting for business. Concrete results, not slide decks.

Rodrigue Le Gall

Serial software entrepreneur. Process automation expert since before generative AI.

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