

10 Administrative Tasks Every Contractor Should Automate

Check a task once its inputs, reviewer and stop conditions are defined.

☐ **1. Daily job logs**

Dictated notes to dated work, crew, delivery and delay records. Verify facts.

☐ **2. Client progress updates**

Approved logs to a short update. Check milestones before sending.

☐ **3. Change order drafts**

Scope, reason, price and schedule impact. Review and obtain approval.

☐ **4. Safety meeting recaps**

Actual topics, attendance and actions. Never invent compliance.

☐ **5. Missed-call follow-up**

Callback details and response drafts. Check consent, urgency and routing.

☐ **6. Estimate follow-up**

Queue reminders. Stop when the prospect replies, declines or books.

☐ **7. Appointment confirmations**

Confirmed time, address and preparation. Check crew availability.

☐ **8. Receipt organization**

Extract vendor, date and amount. Compare to the original receipt.

☐ **9. Job photo filing**

Sort by job, date and stage. Verify the property and access permissions.

☐ **10. Invoice reminders**

Use verified balances. Stop on payment, dispute or correction.

Start with one task

Chosen task: _____

Owner: _____ Review date: _____

Current minutes/week: _____ Pilot minutes/week: _____

Errors or missed steps: _____