RunlightAI

5 Tasks to Automate *First*

The professional services checklist with dollar amounts, specific tools, and implementation tips.

After 30 years evaluating businesses as a financial advisor, investment banker, and CFO, I see the same five time-wasting patterns in every professional services firm. This guide shows you exactly what to fix and how much you'll save.

$52K–$82K
ANNUAL SAVINGS

20–34 hrs
RECOVERED / WEEK

5
ACTIONABLE TASKS

runlightai.com · Denver, Colorado

01 Client Intake and Onboarding

Saves 5–8 hrs/week · $12,000–$18,000/year

New clients fill out paper forms or PDFs. Someone rekeys that data into your system. Documents get emailed back and forth. First billable work doesn't start for 3–5 days.

THE FIX

- ✓ Replace PDF forms with digital intake that feeds directly into your CRM
- ✓ Auto-generate engagement letters from form data
- ✓ Set up automatic welcome emails with next steps
- ✓ Create shared client folders that auto-populate

Tools: Jotform or Typeform · Zapier to connect to CRM · PandaDoc for agreements

3 days → same day

TYPICAL INTAKE TIME REDUCTION WITH A WEEKEND OF SETUP

02 Appointment Scheduling

Saves 3–5 hrs/week · $7,000–$12,000/year

Clients call to book. Front desk plays phone tag, checks availability, sends confirmation, then a reminder. Multiply by 20–40 appointments per week.

THE FIX

- ✓ Online self-scheduling linked to real-time availability
- ✓ Automated confirmation emails and text reminders
- ✓ Let clients reschedule without calling
- ✓ Sync with calendar — double-bookings become impossible

Tools: Calendly ($12/mo) · Cal.com (free) · or the scheduler in your practice management software that nobody turned on

30–50%

Reduction in no-shows from automated text reminders alone. That's thousands in recovered revenue before you change anything else.

03 Follow-Up Emails and Client Communication

Saves 4–6 hrs/week · $10,000–$15,000/year

After a meeting, someone manually types a follow-up. When a milestone hits, someone remembers (or forgets) to update the client. When an engagement closes, there's no systematic check-in.

THE FIX

✓ Create templates for your 5 most common communications

✓ Automate: when project status changes, the client gets notified

✓ Build a post-engagement sequence (30, 60, 90 days) for referrals

✓ Use AI to draft custom emails in seconds instead of minutes

Tools: Mailchimp or ConvertKit · Claude or ChatGPT for drafting · your CRM's built-in automation

> *"This is where the real money hides. Firms that automate post-engagement follow-up see 20–40% more repeat business and referrals. It's not a cost saving — it's revenue generation."*

04 Document Generation and Data Entry

Saves 5–10 hrs/week · $15,000–$25,000/year

Your team creates the same documents over and over — proposals, reports, invoices, letters — retyping client info each time. Data gets manually copied between systems. Everyone does a little copy-paste every day.

THE FIX

✓ Build document templates with merge fields from your CRM

✓ Connect systems so data entered once flows everywhere

✓ Use AI to draft reports and proposals from structured inputs

✓ Set up OCR to extract data from incoming documents

Tools: Zapier or Make.com · Google Docs/Word templates with merge fields · AI assistants for drafting

$15K–$25K The biggest savings on this list — and the hardest to see because it's spread across every person doing a little copy-paste each day.

05 Reporting and Status Tracking

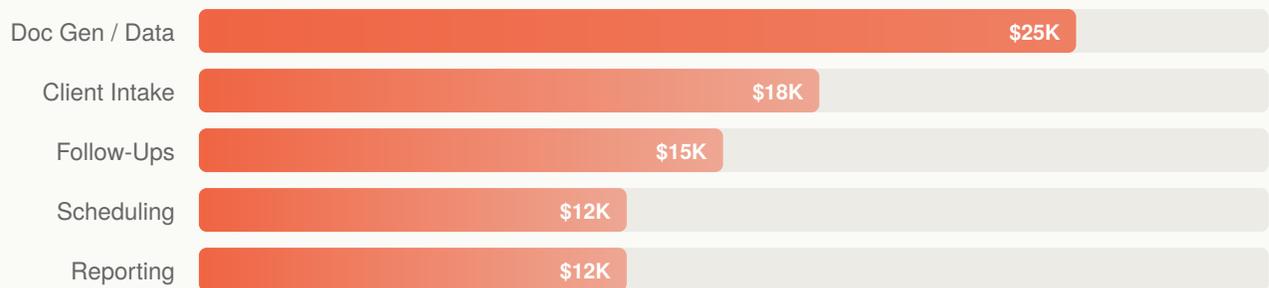**Saves 3–5 hrs/week · $8,000–$12,000/year**

The managing partner asks for a status update. Someone spends two hours pulling data from three systems, formatting a spreadsheet. By delivery, half the numbers are stale.

THE FIX

✓ Set up a live dashboard pulling from your existing tools

✓ Automate weekly reports that email themselves Monday morning

✓ Create alerts for exceptions — late invoices, dormant clients

✓ Replace "where are we on this?" with a system that answers first

Tools: Google Looker Studio (free) or Power BI · Zapier for reports · Slack/Teams for alerts

Annual Savings by Task

Task	Savings
Doc Gen / Data	$25K
Client Intake	$18K
Follow-Ups	$15K
Scheduling	$12K
Reporting	$12K

TOTAL ANNUAL SAVINGS

$52,000 – $82,000

Conservative at $25–35/hr admin labor. If professionals billing $150–400/hr also do these tasks, the real number is significantly higher.

Want to know exactly where your firm stands?

We run a fixed-price AI Operations Audit for professional services firms. In 10 days, we map every workflow, identify every automatable task, and deliver a prioritized roadmap with dollar amounts.

$2,500 – $5,000 · Fully Remote · 10 Business Days

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