



Office Automation Checklist

This is an extra resource to go along with the original article:

[*A Few Time-Saving SaaS Tools for Every Modern Workplace*](#)

Below are a list of office tasks that have specialized software tools available to streamline or eliminate repetitive tasks. Scan the list and consider which areas could be improved at your own company, then start your research for a software solution.

Administration

Phone answering
Meeting scheduling
Travel planning
Inventory management
Building maintenance and management
Visitor management

Accounting

Taxes
Payroll
Accounts receivable / Invoicing
Accounts payable / Receipts / Expenses
Budgeting
Forecasting

Human Resources

Recruiting
Hiring
Onboarding

Benefits enrollment and tracking
Compliance
Employee evaluations
Assessing engagement and morale

Marketing and Sales

Customer relationship management
Marketing campaign management / consolidation
Social media scheduling
Paid ad management

Project Management

Office communications
File sharing
Office procedures and checklists

Customer Support

Support ticketing
Bug reports
Documentation and FAQs