



## 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](#)*

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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