

ServiceScale

The Tradie's Automation Checklist

10 systems you can set up this weekend to save 10+ hours a week. No tech skills needed. No expensive software. Just practical systems that work for real tradies.

10+ hrs/week
Time saved

~19 hours
Total setup time

\$0 cost
Free tools available

How to use this checklist: Work through each system in order. The easy ones take about an hour each. Start with #1 this Saturday morning and you'll have half of them running by Sunday evening.

Want us to set all 10 up for you? Book a free 15-minute strategy call at servicescale.com.au

Why it matters: Reviews are the #1 factor in local search ranking. Most happy clients will leave a review if you make it easy and ask at the right time.

How to set it up:

06 Website Lead Capture Form

Easy | Setup time: 2 hours

Why it matters: If your website doesn't capture enquiries 24/7, you're losing leads while you sleep. A proper form turns visitors into booked jobs.

How to set it up: Add a simple form: Name, Phone, Email, Service Needed, Preferred Time. Auto-respond with a confirmation and estimated response time.

Done Date completed: _____

07 Email Nurture for New Enquiries

Medium | Setup time: 3 hours

Why it matters: Not every enquiry is ready to book today. A nurture sequence keeps you top-of-mind so when they're ready, they call you, not a competitor.

How to set it up: 3-email sequence over 2 weeks: (1) Helpful tips related to their enquiry, (2) Case study showing your work, (3) Limited-time offer or free consultation.

Done Date completed: _____

08 Recurring Job Reminders for Maintenance Clients

Medium | Setup time: 2 hours

Why it matters: Maintenance is the easiest recurring revenue. Clients forget, but your system shouldn't. Automated reminders turn one-off jobs into annual contracts.

How to set it up: Tag maintenance clients in your CRM. Set annual or 6-monthly reminders: "Hi [Name], your [service] is due for its annual check. Reply YES to book."

Done Date completed: _____

09 End-of-Day Job Report Automation

Easy | Setup time: 1 hour

Why it matters: Knowing exactly what your team completed each day means better planning, accurate billing, and no forgotten jobs.

How to set it up: Use your job management app's reporting feature or set up a simple daily digest that emails you: jobs completed, hours logged, revenue earned.

Done Date completed: _____

10 Client Onboarding Welcome Pack

Easy | Setup time: 2 hours

Why it matters: First impressions matter. An automated welcome pack makes you look professional and sets clear expectations from day one.

How to set it up: When a new client is added, auto-send: welcome email, what to expect document, your contact details, and any preparation instructions for their first job.

Daut yompleuto: _____ job.

Want All 10 Systems Running Without Lifting a Finger?

We set up automation systems for tradies every day. While you're on the tools, we'll build the systems that keep your business running in the background.

Book a Free 15-Minute Strategy Call

We'll review your current setup, identify the 3 biggest time-wasters, and give you a clear plan to automate them. No sales pitch, no obligation.

servicescale.com.au

"We went from spending 15 hours a week on admin to under 3. ServiceScale set up our whole system in a week."

- Melbourne Electrician, ServiceScale Client