

The two-column evening task check

Use this one-page worksheet to audit the repetitive messages, checklists, and follow-ups you still type by hand after hours.

Set these aside before you sort

Set aside one-off legal decisions, employee performance conversations, pricing policy changes, and bank transfers first. Those stay with the owner every time and never belong in an automated drafting queue.

1. Write down every task you chased after 6 p.m. this week. Open your sent folder, notepad, and browser tabs from the last five evenings and list every 2-star review reply, late invoice reminder, and quote follow-up you wrote by hand.
2. Draw two columns on the worksheet. Label the left column What we do (judgment, pricing, and final approval) and the right column What I no longer chase by hand (first drafts and status checks).
3. Sort your tasks by your industry's daily bottlenecks.
 - Home services examples (bookings and dispatch): Put final price-book changes and emergency truck assignments in the left column; put after-hours callback drafts (Mia), day-six estimate follow-ups (Cody, an illustration), dispatch slot prep (Hank), overdue invoice reminders (Nora), and closed-job review asks (Reggie) in the right column.
 - Real estate examples (deal paperwork): Put assigning a new lead to an agent and negotiating contract terms in the left column; put buyer inquiry reply drafts (Cody), transaction checklist tracking (Olivia), and missing deadline alerts (Sam) in the right column.
 - Restaurant examples (catering and reservations): Put menu pricing and final party confirmation in the left column; put catering quote drafts from your menu notes (Cody), event calendar date checks (Olivia), and dining room reservation replies (Mia) in the right column.
4. Pick one right-column workflow to set up first. Circle the single right-column task that interrupted your evening

most often this week so every draft for that task can wait on an approval card instead of a sticky note.

Scope of this check

Sorting your own evening task list shows which repeatable drafts and checklist steps can be prepared ahead of your review. A check on your own tasks never claims hours saved or revenue recovered, and it never claims what a customer did next.

What we do (judgment, pricing, and final approval)	What I no longer chase by hand (first drafts and status checks)

Sample data. Made-up business. The two worksheet entries below are an example for a fictional HVAC shop.

Weak example

Task rule: "Try to answer bad reviews and old quotes faster at night."
Oak Street Heating (Sample data. Made-up business.)

Strong example

Column 1 (What we do): "Owner reads every drafted reply at 8 a.m. and taps Edit, Reject, or Approve and send."
Column 2 (What I no longer chase): "When a 2-star review or 21-day overdue invoice appears (an illustration), Reggie or Nora drafts the response beside the job record before I open my laptop."
Draft worksheet note for Oak Street Heating (Sample data. Made-up business.)