



grassroots
young entrepreneurs in eco-health tourism

Optimising Business Operations Automate Daily Tasks

Includes Digital Tools!



www.ecohealthforyouth.com



This resource is licensed
under CC BY 4.0

This project has been funded with support from the European Commission. The author is solely responsible for this publication (communication) and the Commission accepts no responsibility for any use may be made of the information contained therein. In compliance of the new GDPR framework, please note that the Partnership will only process your personal data in the sole interest and purpose of the project and without any prejudice to your rights therein 2021-2-BE04-KA220-YOU-000050778



Co-funded by
the European Union

Contents

Challenges

- 01** Struggling to Automate Repetitive Tasks for Time Efficiency

- 02** Spending Too Much Time on Manual Tasks

- 03** Missing Follow-Ups with Partners or Customers

- 04** Inefficient Tracking of Inventory or Resources

- 05** Struggling to Manage Social Media Posting Schedules

- 06** Managing Complex Eco-Tourism Itineraries Across Multiple Locations

- 07** Mapping and Maintaining Accurate Records of Street Art Installations

- 08** Shortening the Time to Transcribe and Summarise Meetings or Interviews

- 09** Tracking Safety Protocols and Equipment Maintenance for Adventure Sports

- 10** Ensuring Sustainable Sourcing for Eco-Conscious Food Events



Contents

Challenges

- 11** Failing to Track Environmental Progress and Sustainability Goals

- 12** Time-Consuming Repetitive Tasks Hindering Business Growth

- 13** Repetitive Invoicing Tasks Taking Time Away from Business Growth

- 14** Time-Consuming Manual Appointment Scheduling

- 15** Providing Timely Customer Support Outside of Working Hours

- 16** Managing Multiple Tasks and Project Elements Without Clear Organisation

- 17** Time-Consuming and Disorganised Team Member Onboarding

- 18** Ineffective Communication of Sustainability Efforts to Customers



Automate Daily Tasks

Challenges & Digital Solutions



Automate Daily Tasks: Simplify Daily Tasks Through Smart Automation



Challenge 1

Struggling to Automate Repetitive Tasks for Time Efficiency

Struggling to automate repetitive tasks to save time and focus on growth.

Solution

Automate repetitive processes to focus your time on scaling your eco-friendly business. Automation tools make small teams more efficient and reduce errors.

Optimisation Tools

Zapier and HubSpot CRM

Zapier: Automate workflows by connecting apps like Google Sheets, Mailchimp, and Slack. For example, automatically add a new customer inquiry to your task board or send welcome emails to new participants. slack.com mailchimp.com
<https://workspace.google.com/products/sheets/> zapier.com

HubSpot CRM: Automate customer follow-ups, lead tracking, and email campaigns to ensure your relationships with partners and customers remain strong.
<https://www.hubspot.com/products/crm>

Automate Daily Tasks

Challenges & Digital Solutions



Challenge 2

Spending Too Much Time on Manual Tasks

Spending too much time on manual tasks like scheduling or invoicing.

Solution

Automate repetitive tasks to free up time for creative and strategic efforts.

Optimisation Tools

Zapier and **Calendly**

Zapier: Automate workflows between apps like Gmail and Slack. slack.com zapier.com

Calendly: Streamline meeting scheduling. <https://calendly.com/>



Challenge 3

Missing Follow-Ups with Partners or Customers

Solution

Set automated reminders or follow-up messages to maintain relationships.

Optimisation Tools

HubSpot CRM and **Boomerang for Gmail**

HubSpot CRM: Automate follow-ups and manage contacts.

<https://www.hubspot.com/products/crm>

Boomerang for Gmail: Schedule emails to be sent at optimal times.

<https://www.boomeranggmail.com/>

Automate Daily Tasks

Challenges & Digital Solutions



Challenge 4

Inefficient Tracking of Inventory or Resources

Solution

Digitise inventory tracking to prevent shortages or overstocking.

Optimisation Tools

Sortly and **Square POS**

Sortly: Visual inventory management for small businesses.

<https://www.sortly.com/>

Square POS: Track sales and inventory for event-based operations.

<https://squareup.com/ie/en/point-of-sale>



Challenge 5

Struggling to Manage Social Media Posting Schedules

Solution

Use scheduling tools to plan posts in advance and ensure consistency.

Optimisation Tools

Buffer and **Later**

Buffer: Plan and automate social media posts. buffer.com

Later: Schedule Instagram and Pinterest posts with visual previews. <https://later.com/>

Automate Daily Tasks

Challenges & Digital Solutions



Challenge 6

Managing Complex Eco-Tourism Itineraries Across Multiple Locations

Solution

Use a project board for eco-tourism packages, breaking down each location's activities into tasks. Include columns for logistics (transport, accommodation, guides), environmental impact assessments, and sustainable resources. Automate reminders for team members to finalise arrangements or submit reports on conservation efforts.

Optimisation Tools

Trello, Asana, Monday.com and **AirTable**

Trello: Create a project board for each eco-tourism package with columns for location activities, logistics (transport, accommodation, guides), and sustainability assessments. You can add due dates, labels, and checklists for each task, ensuring a clear overview of all aspects of the itinerary. trello.com

Asana: Organize tasks for each eco-tourism destination and team member. Asana allows you to set timelines, assign responsibilities, and track the completion of sustainability assessments and arrangements. asana.com

Monday.com: Visualize your eco-tourism itineraries with a customizable board layout that includes tasks, deadlines, and progress tracking. Monday.com can integrate environmental impact tracking and reminders to ensure timely and sustainable execution.

AirTable: Track logistics, environmental impact assessments, and sustainable resources across locations in an organized database. With customizable views and automation, you can manage complex itineraries. <https://www.airtable.com/>

Automate Daily Tasks

Challenges & Digital Solutions



Challenge 7

Mapping and Maintaining Accurate Records of Street Art Installations

Solution

Set automated reminders or follow-up messages to maintain relationships.

Optimisation Tools

Mapillary

Deploy **Mapillary** to crowdsource updates on street art installations. Ask local community members to upload photos and geolocation data of murals or sculptures. Use the app to create an evolving map of urban art, ensuring the data is preserved for cultural tours and projects highlighting environmental messages through art.
<https://www.mapillary.com/>



Challenge 8

Shortening the Time to Transcribe and Summarise Meetings or Interviews

Solution

Use a tool that automates and quickly transcribes conversations and extracts key points and actions that need to be done.

Automate Daily Tasks

Challenges & Digital Solutions



Optimisation Tools

Otter.ai

Otter.ai is a powerful tool for transcribing and summarizing conversations in real-time, making it ideal for streamlining interviews, meetings, and evaluations. With Otter, you can convert spoken content into accurate text, allowing you to focus on key insights and save time on manual note-taking. For GRASSROOTS ideas, Otter is an invaluable tool for simplifying the hiring process. Whether you're conducting interviews with potential team members, assessing suppliers, or evaluating partnerships, Otter helps you quickly transcribe conversations, extract key points, and stay organized. This enables you to make informed decisions faster, ensuring your business runs smoothly while you focus on creating sustainable and impactful eco-tourism experiences. <https://otter.ai/>



Challenge 9

Tracking Safety Protocols and Equipment Maintenance for Adventure Sports

Solution

Create a central database to monitor and manage equipment status, safety inspections, and team certifications, ensuring that all safety requirements are met and compliance is maintained for eco-adventure tourism activities.



Automate Daily Tasks Challenges & Digital Solutions



Optimisation Tools

Airtable, Google Sheets, Trello, SafetyCulture (iAuditor) and Slack

Airtable: Use Airtable to create a customizable database that tracks safety inspections, equipment maintenance schedules, and certifications. Implement conditional formatting to highlight overdue checks or expired certifications. You can create fields for equipment types, inspection dates, maintenance status, and certifications, helping to keep all team members on the same page. <https://www.airtable.com/>

Google Sheets: For a more accessible option, use Google Sheets to log safety protocols and equipment maintenance, with built-in features like color-coded alerts for overdue items. It's simple to use and can be shared among team members in real-time. <https://workspace.google.com/products/sheets/>

Trello: Set up a project board specifically for safety checks, where tasks like equipment inspections and team certification renewals are listed as cards. Assign due dates, team members, and checklists to ensure proper tracking. trello.com

SafetyCulture (iAuditor): Use this mobile app for inspections and audits. It allows you to create custom checklists for safety protocols and equipment maintenance, and it helps automate the reporting process with features like photo documentation and automated reminders. <https://safetyculture.com/iauditor/>

Slack: Integrate a safety reminder system into Slack by setting up alerts for team members when inspections or certifications are due. This provides a quick and convenient way to ensure the team stays informed about safety protocols. slack.com



Automate Daily Tasks

Challenges & Digital Solutions



Challenge 10

Ensuring Sustainable Sourcing for Eco-Conscious Food Events

Solution

Create a centralized, organized system to track sustainable suppliers and make informed sourcing decisions, ensuring that ingredients align with environmental and ethical standards for eco-conscious food events.

Optimisation Tools

Evernote, Airtable, Google Sheets, Trello, LocalHarvest and **FarmDrop**

Evernote: Use Evernote to create a notebook dedicated to sustainable suppliers. Organize it by categories such as product types (e.g., vegetables, grains, dairy) and supplier locations. Include details like certifications (e.g., organic, fair trade), delivery options, and seasonal availability. This will help event organizers quickly access and make sustainable sourcing decisions. <https://evernote.com/>

Airtable: Create a database with categories for supplier names, contact details, certifications, products offered, delivery options, and seasonal availability. Airtable's collaboration features make it easy to share and update information with the team. <https://www.airtable.com/>

Google Sheets: For a more straightforward solution, use Google Sheets to track sustainable suppliers. Include columns for product type, certification, location, and other key details, and share the document with event organizers for collaborative editing. <https://workspace.google.com/products/sheets/>

Trello: Set up a Trello board with lists for different supplier categories (e.g., fruits, vegetables, beverages) and use cards for individual suppliers. Include information on their sustainability practices, delivery schedules, and seasonal products. trello.com

Automate Daily Tasks Challenges & Digital Solutions



LocalHarvest: Use the LocalHarvest website or app to find sustainable and local food producers. This platform allows you to search by product type and location, ensuring you source ingredients from sustainable, local suppliers. <https://www.localharvest.org/>

FarmDrop: Use FarmDrop, a platform that connects consumers and businesses with local farmers, to ensure that you source fresh, sustainable produce directly from local farmers and suppliers. This can streamline your event sourcing process and support the local economy. <https://farmdrop.us/>



Challenge 11

Failing to Track Environmental Progress and Sustainability Goals

Failing to track your environmental progress or getting lost in the day-to-day operations without focusing on your sustainability goals.

Solution

Implement tools to track your environmental impact, set measurable sustainability goals, and stay informed about the latest trends and best practices. This will help you remain focused on long-term sustainability while managing daily operations effectively.

Optimisation Tools

Ecochain, GreenBiz, Carbon Footprint Calculator, Sustainability Tracking Tools, Trello/Asana, Google Analytics and Microsoft Power BI

Ecochain: A platform to track and measure your carbon footprint, energy usage, and overall environmental impact. Ecochain helps you set sustainability goals and monitor progress, making it easier to stay accountable and improve your environmental performance over time. <https://ecochain.com/>

Automate Daily Tasks Challenges & Digital Solutions



GreenBiz: Stay informed with the latest sustainability news, trends, and resources. GreenBiz provides valuable tools, articles, and guides for businesses looking to reduce their environmental impact, from waste management to sourcing sustainable materials. <https://trellis.net/>

Carbon Footprint Calculator: Use a carbon footprint calculator to estimate and track your business's environmental impact, helping you take targeted actions toward reducing emissions.

Sustainability Tracking Tools (e.g., Green Steps, Sustainability Cloud): These tools offer easy-to-use dashboards for monitoring your environmental goals, tracking your carbon emissions, and providing detailed reports that can be shared with stakeholders to showcase your sustainability efforts. <https://ecounesco.ie/green-steps-green-skills/>

Trello/Asana: Set up dedicated boards or projects for sustainability, where you can track goals, deadlines, and action steps related to your environmental objectives. Regularly review your progress and adjust plans as necessary. trello.com asana.com

Google Analytics: Use Google Analytics to track energy consumption on your website or online platforms. It can give you insights into your digital sustainability performance, such as server energy usage. <https://marketingplatform.google.com/about/analytics/>

Microsoft Power BI: Create custom dashboards to visualize and track environmental metrics such as energy use, waste reduction, and carbon emissions across your operations. This will allow you to make data-driven decisions to meet sustainability goals. <https://www.microsoft.com/en-us/power-platform/products/power-bi>



Automate Daily Tasks

Challenges & Digital Solutions



Challenge 12

Time-Consuming Repetitive Tasks Hindering Business Growth

Time-consuming repetitive tasks that take away from focusing on creative or strategic business growth.

Solution

Use automation tools to handle routine tasks such as sending reminders, posting on social media, or following up with leads. This will free up time for more creative or high-priority activities, allowing you to grow your business more efficiently.

Optimisation Tools

Zapier, Automate.io, IFTTT, Buffer, Mailchimp, Trello/Asana and QuickBooks or Wave

Zapier: Automate workflows by connecting your favorite apps and creating custom automation rules. For example, when a customer makes a purchase on your website, Zapier can automatically add them to your Mailchimp email list and send a “Thank You” email. mailchimp.com zapier.com

Automate.io: Similar to Zapier, Automate.io enables you to connect various apps and automate repetitive tasks, from updating spreadsheets to posting social media content, all without any coding knowledge. automate.io

IFTTT: "If This Then That" lets you set up automated tasks between apps. You could automate actions like sharing new blog posts across social media platforms or syncing data between apps like Google Sheets and Dropbox. <https://workspace.google.com/products/sheets/>

Buffer: Automate social media posts across multiple platforms, such as Instagram, Twitter, or Facebook. Buffer allows you to schedule posts in advance, saving you time and keeping your social media presence active without daily manual effort. buffer.com

Automate Daily Tasks

Challenges & Digital Solutions



Mailchimp: Automate email marketing campaigns, including follow-up emails, welcome series, and newsletters, based on customer actions like signing up or making a purchase. mailchimp.com

Trello/Asana: Use these project management tools with integrated automation to create reminders for deadlines, team updates, and task assignments. Automate recurring tasks like sending out weekly updates or reminders to keep your team on track. trello.com asana.com

QuickBooks or **Wave:** Automate invoicing, expense tracking, and financial reports to keep your business finances organized without manual entry, allowing you to focus on business strategy instead. quickbooks.intuit.com waveapps.com



Challenge 13

Repetitive Invoicing Tasks Taking Time Away from Business Growth

Repetitive tasks such as invoicing take up valuable time that could be used for strategic business growth.

Solution

Automate invoicing to save time and reduce errors. Setting up automatic invoicing means you don't have to manually generate or send invoices, leaving you more time for strategic tasks like business development, customer engagement, or sustainability planning.

Automate Daily Tasks

Challenges & Digital Solutions



Optimisation Tools

Zoho Invoice, Wave, FreshBooks, QuickBooks and **Xero**

Zoho Invoice: Automates invoicing by creating customizable invoice templates and sending them automatically based on triggers, like a new sale or service completion. You can also set up reminders for overdue payments and track invoice status in real-time. <https://www.zoho.com/invoice/>

Wave: A free accounting tool that allows you to create and send recurring invoices automatically. You can also set up payment reminders and track payment statuses to streamline your billing process. waveapps.com

FreshBooks: Offers automated invoicing, payment reminders, and recurring billing. It allows you to track and manage payments, while also providing detailed reports on financial performance. www.freshbooks.com

QuickBooks: Automates invoicing and integrates with your accounting system, allowing you to send invoices, accept payments, and track financial data automatically. quickbooks.intuit.com

Xero: An easy-to-use accounting tool that helps you automate invoicing, create recurring invoices, and track payments, while ensuring everything is organized for tax purposes. <https://www.xero.com/ie/>

Automate Daily Tasks

Challenges & Digital Solutions



Challenge 14

Time-Consuming Manual Appointment Scheduling

The hassle of scheduling appointments manually through emails or voice messages is time-consuming and can lead to miscommunications and scheduling errors.

Solution

Set up an automated scheduling system that allows customers to book appointments, consultations, or service slots online, eliminating the need for back-and-forth communication. This reduces administrative workload and enhances customer experience.

Optimisation Tools

Calendly, SimplyBook.me, Acuity Scheduling, Booksy and Setmore

Calendly: A popular tool that lets customers choose a time slot based on your availability. It integrates with your calendar to avoid double-booking and sends automatic reminders to customers before the appointment. <https://calendly.com/>

SimplyBook.me: Another scheduling tool that allows customers to book appointments and services online. It offers features such as booking confirmation, reminder emails, and the ability to accept payments through the platform. <https://simplybook.me/en/>

Acuity Scheduling: Similar to Calendly, it allows customers to book appointments online while automating confirmations, reminders, and follow-ups. It also supports custom forms for collecting relevant client information. <https://acuityscheduling.com/>

Booksy: This scheduling tool is tailored for service-based businesses, allowing clients to book appointments, pay for services, and receive reminders, helping businesses streamline their scheduling process. <https://booksy.com/en-ie/>

Setmore: A scheduling tool that enables businesses to manage appointments, send automatic reminders, and accept payments online, all in one platform. <https://www.setmore.com/>

Automate Daily Tasks

Challenges & Digital Solutions



Challenge 15

Providing Timely Customer Support Outside of Working Hours

Customers need timely support, but providing real-time assistance 24/7 can be resource-intensive and challenging outside of working hours.

Solution

Implement a live chat system that offers real-time support during business hours and switches to automated responses or ticket creation after hours. This ensures customers receive immediate help when available and can still get the information they need or submit queries outside of business hours.

Optimisation Tools

LiveChat, Crisp, Tidio, Intercom and **Zendesk**

LiveChat: This tool enables real-time chat support during business hours and can be set up with automated responses or ticket systems after hours. It integrates with various platforms and offers analytics to improve customer service. www.livechat.com

Crisp: Another live chat solution that allows businesses to provide instant customer support. Crisp includes features like automated messages, real-time tracking, and a knowledge base to assist customers outside of operating hours. <https://crisp.chat/en/alternatives/livechatinc/>

Tidio: A live chat tool that offers both human and automated responses. It includes AI-powered chatbots for after-hours support, FAQ automation, and ticketing for follow-up responses. www.tidio.com

Intercom: A messaging platform that combines live chat, automated bots, and help desk functionality. It ensures seamless communication and provides real-time assistance during working hours, with automated help outside of those hours. www.intercom.com

Automate Daily Tasks

Challenges & Digital Solutions



Intercom: A messaging platform that combines live chat, automated bots, and help desk functionality. It ensures seamless communication and provides real-time assistance during working hours, with automated help outside of those hours. www.intercom.com

Zendesk: This tool provides live chat along with ticketing systems for tracking customer queries. It allows businesses to automate support outside of regular hours and offers detailed analytics to improve service. zendesk.com



Challenge 16

Managing Multiple Tasks and Project Elements Without Clear Organisation

Managing multiple tasks and project elements can be overwhelming without a clear and organized system, leading to missed deadlines, disorganized resources, and confusion about responsibilities.

Solution

Revise your project management system to include labels like “urgent” or “pending” and assign clear deadlines, responsibilities, and resources for each task. Use a visual project management platform to break down large projects into smaller, manageable tasks and set reminders to ensure tasks are completed on time.

Optimisation Tools

Trello, Asana, Monday.com and **Notion**

Trello: Organize your tasks using boards, lists, and cards. Each board can represent a different project, and you can add labels like “urgent” or “pending” to individual tasks. You can also set due dates, assign tasks to team members, and add attachments or checklists to ensure all resources are accessible. trello.com

Automate Daily Tasks

Challenges & Digital Solutions



Asana: A robust task management tool that allows you to create projects, assign tasks with deadlines, and track progress visually. You can organize tasks by priority and category, making it easy to stay on top of responsibilities. Asana also integrates well with other tools, which is perfect for maintaining eco-tourism initiatives. asana.com

Monday.com: This platform offers a customizable project management system that allows you to create workflows and dashboards tailored to your needs. You can manage tasks, track deadlines, and visualize progress with colorful charts, all while assigning responsibilities to team members for clearer accountability.

Notion: A flexible tool for creating organized task boards and lists. Notion can be customized with reminders, tags, and deadlines to manage everything from eco-tourism events to daily operations. <https://www.notion.so/>



Challenge 17

Time-Consuming and Disorganised Team Member Onboarding

Onboarding new team members can be time-consuming and overwhelming without a structured process, potentially leading to confusion or delays in getting them up to speed.

Solution

Create a streamlined onboarding process that includes a welcome kit with job descriptions, essential training materials (such as videos), and a checklist for their first tasks. Draft a clear and welcoming onboarding email to guide new hires through the initial steps, ensuring they have everything they need to succeed.

Automate Daily Tasks

Challenges & Digital Solutions



Optimisation Tools

Gusto, Trello, Notion, Google Drive and **Slack**

Gusto: Simplifies the onboarding process by handling paperwork, tracking employee hours, and ensuring timely payroll. Gusto allows you to efficiently manage employee benefits, tax filing, and compliance, helping you stay organized as your team grows. <https://gusto.com/>

Trello: Create an onboarding board where each new employee can follow along with the steps in their training. You can include links to training materials, videos, and task checklists, making it easy for them to check off completed tasks and stay organized. trello.com

Notion: Set up an onboarding page with job descriptions, company culture guidelines, and training resources. Notion allows for easy sharing and collaboration, so new hires can access everything they need in one place. <https://www.notion.so/>

Google Drive: Create a shared folder with onboarding documents like job descriptions, training materials, and checklists. This is an easy way to centralize information and give new hires access to all the necessary resources. https://workspace.google.com/intl/en_ie/products/drive/

Slack: Use Slack to create an onboarding channel where new employees can ask questions, get quick support, and connect with other team members. Slack also integrates well with other tools, making it easier to share documents and tasks. slack.com



Automate Daily Tasks

Challenges & Digital Solutions



Challenge 18

Ineffective Communication of Sustainability Efforts to Customers

Failing to effectively communicate your sustainability efforts to customers, which can lead to missed opportunities for building trust and loyalty. Customers are increasingly prioritizing eco-friendly businesses and may be more likely to support you if they understand the positive environmental impact you're making.

Solution

Actively educate your customers about your sustainability practices and create an easy communication channel for them to ask questions or learn more. By integrating tools for customer service, feedback collection, and real-time updates, you can ensure that your customers are well-informed and engaged with your green initiatives.

Optimisation Tools

Zendesk, Tidio Chatbots, SurveyMonkey, Instagram Stories/Reels and **Mailchimp**

Zendesk: A customer service platform that allows you to provide support and answer customer inquiries, including those about your sustainability efforts. You can set up automated responses or live chats to quickly address questions related to your eco-friendly practices, making your business appear transparent and accessible. [zendesk.com](https://www.zendesk.com)

Tidio Chatbots: Integrate a chatbot on your website or in your app to answer common customer questions about your sustainability practices. The chatbot can share key facts about your eco-friendly efforts, such as waste reduction initiatives, sourcing materials, or energy-saving practices. This can help provide immediate responses without requiring staff intervention. [tidio.com](https://www.tidio.com)

SurveyMonkey: Use surveys to gather valuable feedback from customers about how they perceive your sustainability efforts. You can ask questions like “How important is sustainability when choosing our products/services?” or “What sustainability initiatives would you like to see more of?” This feedback can guide your future efforts and strengthen your customer relationships. <https://www.surveymonkey.com/>



Automate Daily Tasks

Challenges & Digital Solutions

Instagram Stories/Reels: Use these features to share short, engaging content highlighting your sustainability efforts. Post behind-the-scenes footage of eco-friendly practices, such as sustainable sourcing, waste management, or community initiatives. This can keep your audience informed and show your dedication to environmental responsibility. <https://www.instagram.com/reels.stories/?hl=en>

Mailchimp: Regularly send out newsletters that update your customers on your latest sustainability efforts, new eco-friendly products, or green initiatives. You can also segment your audience to send tailored messages based on their interests in sustainability. mailchimp.com



www.ecohealthforyouth.com



Well Done!

Great job exploring these ideas! Now it's time to dive in, investigate the tools, and start putting them into action. Take the next step toward transforming your vision into a reality by making these tools work for you.

» See our Optimising Business Operations Tools [here](#)

Don't Forget to Connect with Us...



This resource is licensed
under CC BY 4.0

This project has been funded with support from the European Commission. The author is solely responsible for this publication (communication) and the Commission accepts no responsibility for any use may be made of the information contained therein. In compliance of the new GDPR framework, please note that the Partnership will only process your personal data in the sole interest and purpose of the project and without any prejudice to your rights therein 2021-2-BE04-KA220-YOU-000050778



Co-funded by
the European Union