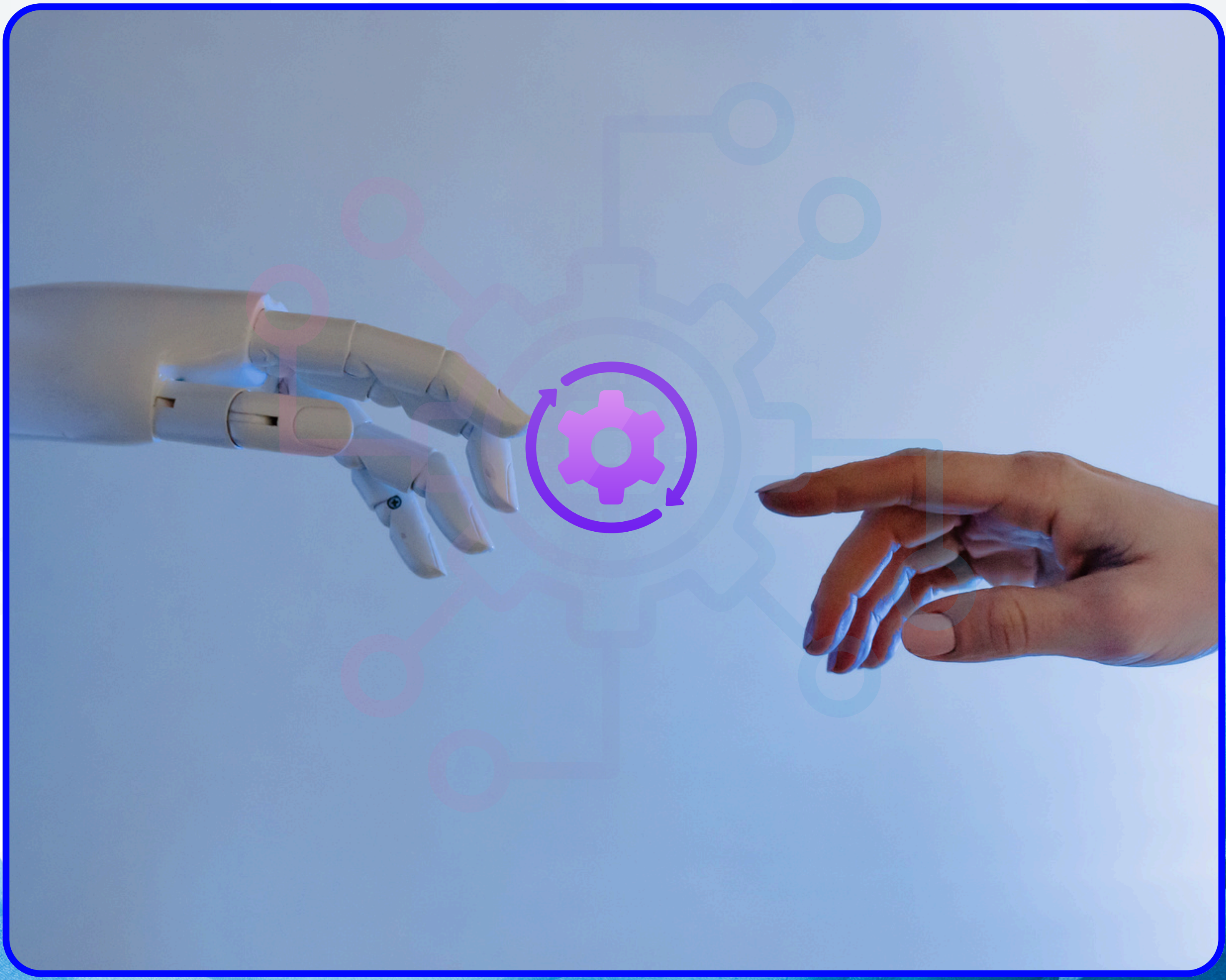
7-Day Automation Kickstart



1. Choose Your Automation Priority

Pick 1 task that's time-consuming but repetitive (e.g., sending Zoom links, lead intake emails).

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2. Map the Manual Steps

Break it down:

- What triggers the task?

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- What needs to happen next?

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- What tool(s) are involved?

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WOW Success Team
Bizness Engineering

3. Choose Your Tools

Match the tools to the task:

- CRM (Pipedrive, SuiteDash, or similar)
- Scheduler (Calendly, or similar)
- Docs (PandaDoc, or similar)
- Communication (Gmail, Slack, or similar)

4. Build the Workflow

Use Zapier (or similar) or your CRM's native automation to connect the steps. Test it.

5. Test With a Real Lead

Run one test all the way through. Note what works or breaks.

6. Add to SOP Library

Document it for your team — screenshots, tool links, triggers, etc.

7. Celebrate + Choose Your Next Automation

What else can you automate?

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- Client check-ins
- Task creation
- Review requests
- Status updates

Small automations = big wins when they stack.

Schedule a free discovery session with WOWSuccessTeam

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