Automation QuickStart Guide

7 High-Impact Workflows to Save Time and Scale Smarter

1. Overview

Want to stop working nights and weekends just to keep up?

Before you hire your next admin, set up these 7 automation workflows to remove bottlenecks, streamline your client experience, and reduce stress.

2. 7 Automations That Work

#	Automation	Tools Needed	What It Does
1	Lead Follow-Up Email	Pipedrive + Gmail/Outlook	Sends instant “thanks” message + link to book a call
2	Calendar Confirmation + Zoom	Calendly + Zoom	Sends Zoom link & reminders for each booked meeting
3	Proposal Trigger	Pipedrive + PandaDoc	Sends custom proposal once status = “Proposal Needed”
4	New Client Welcome Packet	CRM + Google Drive + Zapier	Shares folder, checklist, & onboarding email
5	Task Assignment	CRM + DevStride	Converts “Deal Won” into assigned tasks by role
6	Review Request	CRM + Google Review Link	Triggers email/text with review link after job completion
7	Missed Call Follow-Up	Phone System + Zapier or Twilio	Sends “Sorry we missed you!” SMS when calls aren’t answered

3. Setup Tips

- Start with 1–2 automations, not all 7
- Use test data to confirm each step works
- Assign an "owner" to manage each tool
- Keep messages short and friendly
- Track what's saving you time each week!

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