Top 10 Time-Saving Tech Automations

Cut hours off your week with simple tools and smart workflows.

1.Automation Opportunity Checklist

Mark areas that could be automated:

- ☐ • Lead follow-up
- ☐ • Client onboarding
- ☐ • Proposal or quote generation
- ☐ • Time tracking and reporting
- ☐ • Recurring invoicing
- ☐ • Weekly status updates
- ☐ • Team task assignments

2 Top 10 Automations + Setup Tips

These automation examples are designed to save time, eliminate manual tasks, and reduce human error — whether you're a solopreneur or managing a team. Each one is based on real-world client setups.

2. Top 10 Automations + Setup Tips

1. Lead Response Automation

<u>Tool:</u> Pipedrive (or your CRM) + Workflow Automation

<u>Result:</u> Sends an instant thank-you email and booking link after a lead fills out your contact form.

<u>Time Saved:</u> Manual email follow-ups and reminders

<u>WOW Tip:</u> Add a tag based on form source for better tracking and segmentation.

2. Calendar and Zoom Sync

<u>Tool:</u> Calendly + Zoom + Google Calendar

<u>Result:</u> Automatically creates Zoom links and calendar events for all scheduled meetings.

<u>Time Saved:</u> Reduces no-shows and admin scheduling tasks

<u>WOW Tip:</u> Use confirmation emails with calendar attachments and SMS reminders.

2 Top 10 Automations + Setup Tips

3. Email List Segmentation

<u>Tool:</u> MailerLite, ConvertKit, or ActiveCampaign

<u>Result:</u> Automatically tags and segments contacts based on signup source or quiz answers.

<u>Time Saved:</u> Speeds up campaign targeting and personalization

<u>WOW Tip:</u> Use this to send client-specific content that feels curated, not canned.

4. New Client Onboarding Sequence

<u>Tool:</u> Dubsado, HoneyBook, or Zapier + Gmail

<u>Result:</u> Triggers a welcome email, intake form, contract, and invoice once a deal is marked "won."

<u>Time Saved:</u> Hours of repeat admin work

<u>WOW Tip:</u> Include links to SOPs or a short welcome video to elevate the client experience.

5. Invoice and Payment Reminders

<u>Tool:</u> QuickBooks, FreshBooks, or Stripe

<u>Result:</u> Sends automatic reminders before and after due dates

<u>Time Saved:</u> Manual chasing of payments

<u>WOW Tip:</u> Tie this into your CRM so finance and sales are in sync.

6. Project Management Kickoff

<u>Tool:</u> ClickUp, Asana, or DevStride

<u>Result:</u> Once a deal is closed, a templated project board is auto-generated and assigned

<u>Time Saved:</u> No more reinventing the wheel for every new client

<u>WOW Tip:</u> Attach a checklist or SOP inside the first task so your team knows exactly where to start.

7. Task Reminders Based on Status

<u>Tool:</u> Slack + CRM or PM Tool

<u>Result:</u> Sends a message to the team when a task is overdue or status changes

<u>Time Saved:</u> Eliminates constant check-ins and "did you do this?" emails

<u>WOW Tip:</u> Use color-coded status tags to visually prioritize work.

8. Document Collection Workflow

<u>Tool:</u> JotForm + Google Drive + Zapier

<u>Result:</u> Automatically collects, renames, and files submitted documents into folders

<u>Time Saved:</u> Filing, renaming, and chasing docs manually

<u>WOW Tip:</u> Set folder structure by client name for instant access and clarity.

2 Top 10 Automations + Setup Tips

9. Review Request Campaign

Tool: Pipedrive + Email/SMS Tool (e.g., SimpleTexting, MailerLite)

Result: Sends a follow-up request for Google reviews once a project is marked complete

Time Saved: Manual follow-up

WOW Tip: Link directly to your Google review form and offer a heartfelt thank-you.

10. Monthly Reporting Delivery

Tool: Google Data Studio + Slack/Email + Automation Tool

Result: Automatically compiles and sends reports to clients or internal teams on a set schedule

Time Saved: Hours of manual report compiling

WOW Tip: Use visual dashboards and prewritten insights to add extra value without the extra work.

3. Visual Tech Stack Mapping Template

Create a visual of what tools you use and where they connect.

Function	Tool Used	Connected To
CRM		
Scheduling		
Payments		
Project Mgmt		
Email Marketing		
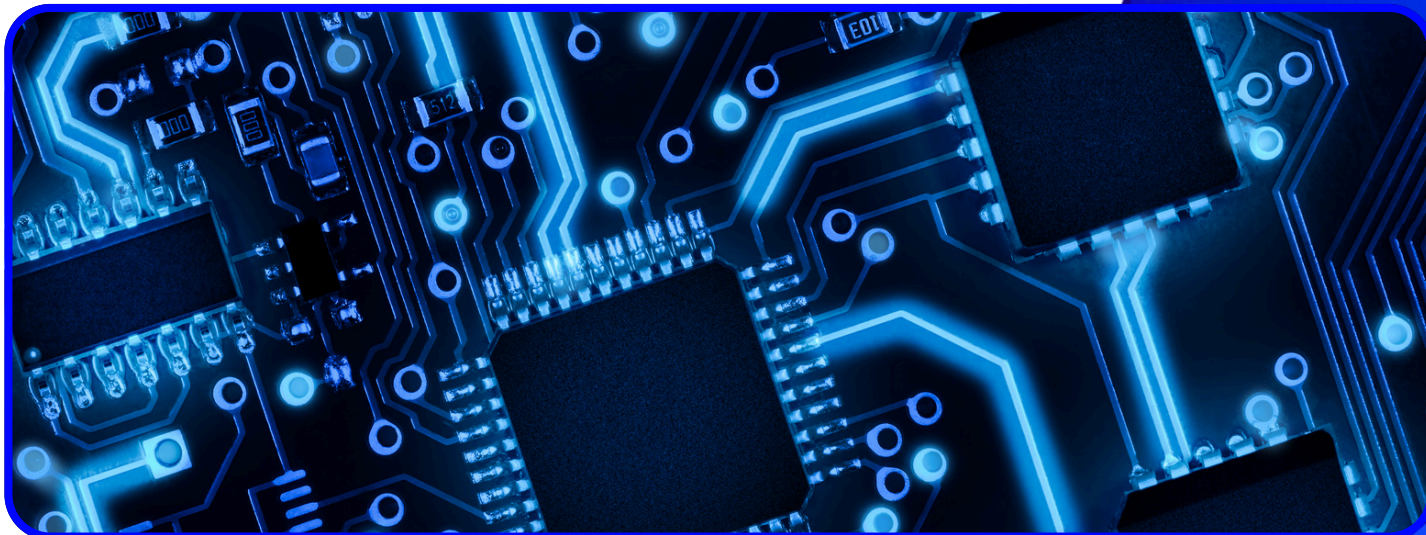
4. Integration Readiness Quiz

Answer Yes or No:

- Do your tools currently "talk" to each other?
- Is there duplication of data entry across systems?
- Are there tasks you repeat weekly or daily?

Score 2+ Yes answers? You're ready to integrate.

Bonus:
Automation ROI Estimator

Estimate your savings:

Task	Time Saved/Week	Team Hourly Rate	Monthly Savings

WRAP-UP:

If you're ready to take the next step, but want a partner to help you get there, schedule a meeting with us.

We'd love to help.

Schedule a free discovery session with WOWSuccessTeam

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