

AI automation for small businesses: your first 5 automations

Find what in your week can be automated, choose between Zapier, Make and n8n, and build 5 starter automations step by step.

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In a small business, much of your time goes to doing the same things again and again: answering form enquiries, sorting email, copying invoices into a spreadsheet, tidying up meeting notes. Many of these can become automations you **set up once and forget**. In this guide we will scan your week for automatable work, pick a tool and build 5 starter automations step by step. No coding required.

What you need

- An account with an automation tool: Zapier, Make or n8n (all three have a free way to start; limits change, so check the current plans)
- A spreadsheet: Google Sheets or Excel
- The apps you already use: email, a form tool, calendar, cloud storage
- An AI step: the tools' own AI modules or the option to connect your own ChatGPT/Claude account
- A quiet hour and a pen and paper

1. Scan your week: what should you automate?

Not every task suits automation. A good candidate repeats often, follows the same steps each time, moves information from one app to another and does not cause major damage if it goes wrong. Describe last week as it was in the prompt below.

PROMPT 1

You are a consultant who helps small businesses with processes and automation.

My work: [describe what you do in 2 sentences]

Apps I use: [email, forms, spreadsheet, accounting, calendar, etc.]

What I did last week (as it comes to mind): [list freely, with rough times]

Task:

1) Put these tasks in a table: task, times per week, estimated time, which apps information moves between.

2) Score each from 1 to 5 for automation fit (frequent, clear rules and low risk score higher).

3) For the top 3, suggest a simple flow in the form "trigger → steps → result".

4) List the tasks that should not be automated and why.

Constraint: Do not invent times or numbers beyond what I gave you.

Tip

For your first automation, pick the simplest, most frequent task rather than the most annoying one. A small win makes the next ones easier.

2. Triggers and actions: the two parts of an automation

All of these tools work on the same logic:

- **Trigger:** the event that starts the flow. "A new form submission arrived", "a new email came in", "a new file was added to a folder".
- **Action:** what happens next. "Add a row to a sheet", "create an email draft", "send a notification".
- **AI step:** a step in between that reads text and classifies, summarises or drafts.
- **Filter / condition:** rules like "only continue if the subject contains 'quote'".

3. Zapier, Make and n8n: which one fits you?

Criterion	Zapier	Make	n8n
Who it is for	Non-technical users who want quick results	People who like building visual flows and want somewhat more complex scenarios	Technically curious users who want to keep data under their own control
Learning curve	Easiest; step-by-step editor	Medium; drag-and-drop visual canvas	Steepest; powerful but more technical
Hosting	Cloud only	Cloud only	Cloud version or self-host on your own server
AI	Built-in AI step and bring-your-own account	AI modules and connections to popular model providers	AI agent nodes and various model providers
Watch out for	Multi-step flows and some apps are limited on the free plan	Usage is counted per module run	When self-hosting, maintenance and security are on you

Short answer: if this is your first try, start with Zapier or Make. When your volume grows or you want data on your own server, look at n8n. Every flow below can be built in all three.



Zapier

Connects your apps and automates repetitive work without code.

[Open the tool: zapier.com](https://zapier.com)



Make

Build multi-step automations with visual flow diagrams.

[Open the tool: www.make.com](https://www.make.com)



n8n

A flexible automation platform for technical teams that can also run on your own server.

[Open the tool: n8n.io](https://n8n.io)

4. Your first 5 automations

Automation 1: Qualify website form leads

Trigger: a new submission from your website form. **Steps:** AI qualifies the request and drafts a reply → the details are added to a sheet → you get an email or message notification. You check the reply and send it yourself.

PROMPT 2

You are an assistant who reviews incoming requests for [business name]. Our services: [list]. Our ideal client: [short description]. Work we do not do: [list].
Incoming form: {{form_data}}

Task:

- 1) Classify the request as "fit / maybe / not a fit" and give a one-sentence reason.
 - 2) List any missing information.
 - 3) Write a warm, clear reply draft to the client of up to 120 words; include 1-2 questions asking for the missing details. Do not promise prices or dates.
- Return it under these headings: CLASS, REASON, MISSING, DRAFT.

Note: you fill fields like {{form_data}} by selecting the matching form field in your automation tool.

Automation 2: Triage your inbox and draft replies

Trigger: a new email to a specific label or address. **Steps:** AI sorts the email into a category → it is labelled based on a condition → a draft is created in your email account for those that need a reply. You still press send.

PROMPT 3

Read the email below.

Email: {{email_body}}

- 1) Choose a category: QUOTE_REQUEST, CLIENT_QUESTION, INVOICE, PROMOTION, OTHER.
 - 2) Urgency: HIGH / NORMAL / LOW.
 - 3) If the category is QUOTE_REQUEST or CLIENT_QUESTION, write a short, polite reply draft on behalf of [your signature name]. Do not invent information you do not have; leave a "[check]" note where needed.
- Output: CATEGORY, URGENCY, DRAFT.

Automation 3: Extract invoice and receipt data into a spreadsheet

Trigger: a new invoice or receipt file in a cloud folder, or an attachment sent to a specific address.

Steps: text is extracted from the document → AI separates the fields → a new row is added to the sheet. Review the sheet before it goes to your accountant.

PROMPT 4

Extract the details from the invoice/receipt text below.

Text: {{document_text}}

Return JSON with only these fields: date (DD.MM.YYYY), vendor, document_no, subtotal, vat, total, currency, category (from [your category list]).

Leave any field not in the text empty; do not guess. Do not add any other explanation.

Automation 4: Turn meeting notes into a summary and tasks

Fathom is a note-taking tool that records Zoom, Google Meet and Microsoft Teams calls and produces a summary and action items. It connects with automation tools, so a finished summary can trigger a flow. **Trigger:** a new meeting summary. **Steps:** AI turns the summary into a follow-up email for the client and a task list → tasks go into a sheet or task tool → the email is saved as a draft.



Fathom

A meeting notetaker that records calls and writes summaries and action items.

[Open the tool: fathom.video](#)

PROMPT 5

Below is the summary of a client call.

Summary: {{meeting_summary}}

1) Write a follow-up email draft to the client of up to 150 words: what we discussed, decisions, next step.

2) List the tasks as "task | owner | due date". Do not invent dates or owners that are not in the summary; leave them blank.

Recording consent

Tell the other person and get their consent before you record a call. It is both courteous and necessary from a personal data point of view.

Automation 5: One piece of content, many platforms

Trigger: a new content idea or blog post link added to a sheet. **Steps:** AI adapts the content for different platforms → the drafts are written into the next columns of the sheet → you edit and schedule them. I recommend leaving them as drafts rather than auto-publishing.

PROMPT 6

You are a content editor writing for [business name]. Brand voice: [friendly / corporate / playful]. Audience: [briefly].

Source content: {{content}}

Create the following from it:

- 1) An Instagram caption (up to 120 words, ending with one question)
- 2) A LinkedIn post (up to 150 words, professional tone)
- 3) An opening line and a 4-point outline for a 30-second short video
- 4) A 2-sentence summary for a newsletter

Do not add claims or numbers that are not in the source.

5. Safety: human review and data privacy

Automation is fast; so are its mistakes. For the first few weeks, every flow should include **a human review step**: AI drafts, you send. Once a flow has run smoothly for a few weeks, you can fully automate the low-risk steps (like logging to a sheet).

Personal data and KVKK

Client names, phone numbers, invoices and emails contain personal data and are passed to third-party services. Find out where each tool processes your data, leave unnecessary fields out of the flow and inform your clients through your privacy notice. For your obligations under KVKK (Turkey's data protection law), I recommend consulting an expert; this is not legal advice.

Common mistakes

1. Picking the most complex process as your first automation.
2. Auto-sending AI-written replies to clients without checking them.
3. Switching a flow on without testing it with real data; send yourself a few test submissions first.
4. Turning off error notifications, so you never hear when a flow breaks.
5. Sending all client data to the AI step when it does not need it.
6. Not documenting your flows; in a few months you will not remember what you built.

Next step

Automations help you respond to incoming requests faster, but first you need those requests to arrive. For that, see the [guide to finding clients with AI](#). If you want an automation plan tailored to your business, we can set up a [1:1 call](#).

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