



A BEGINNER'S GUIDE TO AUTOMATION FOR YOUR SMALL BUSINESS

PRODUCTIVITY

BUSINESS  BUILDERS

AUTOMATION



Automation might sound like a buzzword, but it's really just about using tools and tech to handle repetitive tasks for you. Think of it as hiring a super-efficient virtual assistant who never takes a break. Sounds good?

Here's how to take the first step on the ladder of automating your business tasks.

WHY AUTOMATE?

- Automation saves time: Automation frees you from tedious, repetitive manual tasks.
- Automation reduces errors: Automation tools are more accurate than manual data entry.
- Automation boosts productivity: Focus on the big picture while automation handles the small stuff.

STEP 1: IDENTIFY TASKS YOU CAN AUTOMATE

The best tasks to automate are those that take up a lot of time but don't really require much creative thinking.

Some examples:

- Sending welcome emails to new customers
- Posting social media updates
- Invoicing and payment reminders
- Collecting customer feedback

STEP 2: CHOOSE THE RIGHT TOOLS

You don't need fancy tech skills to start automating. Here are some beginner-friendly tools to explore:

- **Email automation:** [Mailchimp](#), [ActiveCampaign](#)
- **Social media scheduling:** [Buffer](#), [Later](#)
- **Invoicing and payments:** [Xero](#), [QuickBooks](#)
- **Task automation:** [Zapier](#), [Make](#)

STEP 3: SET UP A SIMPLE AUTOMATION

Let's walk through a basic example using email automation:

- Goal: Send a welcome email when someone subscribes to your newsletter.
- Tool: Mailchimp
- Steps:
 1. Create a free Mailchimp account.
 2. Set up a new audience (this is where your subscribers' emails will go).
 3. Design a welcome email using Mailchimp's templates.
 4. Set up an automation trigger: 'When someone joins this audience, send the welcome email.'
 5. Activate the automation. Done!

STEP 4: TEST AND TWEAK

Run a test to make sure everything works smoothly. Send yourself a test email or schedule a social media post to check the process.

STEP 5: BUILD ON YOUR SUCCESS

Once you've mastered simple automation, try linking tools together with an app like Zapier. Example: Add new customers from your website form to your invoicing software.

Ready to reclaim your time? Pick one small task to automate today and see the difference it makes!



3 TIPS TO MAKE YOUR AUTOMATION A SUCCESS

- **Start small:** Tackle one task at a time.
- **Stay personal:** Don't lose your human touch. Automate the admin, not the connection.
- **Review regularly:** Check your automation is still working and functional. Even the best apps can get glitchy over time.