



THE SMALL BUSINESS GROWTH TOOLKIT

PART 2 OF 4

The Small Business Automation Playbook



Actionable strategies for growing your business



Find Repetitive Work Worth Automating

Part 2 of The Small Business Growth Toolkit

Examples, scripts, and schedules are illustrative. They are not customer case studies, reported NBS results, or guarantees. Measure outcomes using your own data.

The Hidden Cost of Manual Work

Every small business owner knows the feeling: you started your business to do what you love, but instead you spend your days on... everything else.

- Sending follow-up emails
- Confirming appointments
- Chasing invoices
- Updating spreadsheets
- Copying information between systems

Track the time your own team spends on these tasks. Workloads vary, and not every step can or should be automated.

Start with a repeatable task whose inputs, approval rules, and exceptions you understand.

What Is Business Automation?

Automation means using technology to perform repetitive tasks without manual intervention.

It's not about replacing humans. It's about freeing humans to do what only humans can do-build relationships, solve complex problems, and grow the business.

Simple automation example:

- Before: Customer fills out form -> You get email -> You manually add to spreadsheet -> You send welcome email -> You set reminder to follow up
- After: Customer fills out form -> System automatically adds to CRM, sends welcome email, and schedules follow-up

Same result. Zero manual work.

The 7 Automations Every Business Needs

1. Lead Capture & Notification

The problem: Leads come in from multiple sources (website, social media, referrals). You forget to follow up. Leads slip through the cracks.

The automation:

- All leads automatically added to one central system
- Instant notification when new lead arrives
- Lead automatically tagged by source

Time to measure: Compare staff time before and after a pilot.

How to implement:

- Connect your website forms to your CRM
- Use Zapier to connect other lead sources
- Set up mobile notifications

2. Appointment Reminders

The problem: No-shows cost you money. Manually texting reminders takes forever.

The automation:

- Automatic reminder 24 hours before appointment
- Automatic reminder 2 hours before appointment
- Easy reschedule link included
- Confirmation request with one-tap response

Time to measure: Compare staff time before and after a pilot.

Measure: Attendance and cancellations before and after reminders.

Sample reminder sequence:

- 24 hours before: "Hi [Name], just a reminder about your appointment tomorrow at [time]. Reply YES to confirm or click here to reschedule."
- 2 hours before: "See you soon! Your appointment is in 2 hours at [location]. Running late? Let us know."

3. Follow-Up Sequences

The problem: You know you should follow up with prospects, but life gets busy. Hot leads go cold.

The automation:

- New lead enters system -> Follow-up sequence starts automatically
- Timed emails/texts over days or weeks
- Sequence stops when prospect responds or books

Time to measure: Compare staff time before and after a pilot.

Sample follow-up sequence:

- Day 0: Instant response (see Guide #1)
- Day 1: "Just checking in-did you get my message?"
- Day 3: Value-add content related to their inquiry
- Day 7: "Still interested? Happy to answer any questions"
- Day 14: "Here's what our customers say..." (testimonial)
- Day 30: "Circling back-is this still on your radar?"

4. Review Requests

The problem: You do great work but don't have the reviews to prove it. Asking feels awkward.

The automation:

- Service completed -> Wait 24 hours -> Send review request automatically
- Invite honest reviews consistently, regardless of expected satisfaction
- Offer a support contact to everyone without filtering public review requests

Time to measure: Compare staff time before and after a pilot.

Measure: Honest feedback received and time spent responding.

Sample review request:

"Hi [Name], thanks for choosing [Company]! We'd love to hear how we did. Mind leaving a quick review? [One-click link to Google]"

5. Invoice & Payment Reminders

The problem: Chasing unpaid invoices is awkward and time-consuming.

The automation:

- Invoice sent -> Automatic reminder at 7 days
- Still unpaid -> Reminder at 14 days
- Include easy pay link in every reminder

Time to measure: Compare staff time before and after a pilot.

Measure: Time from invoice to payment, including overdue balances.

Sample reminder:

"Hi [Name], friendly reminder that invoice #[number] for \$[amount] is due in 3 days. Click here to pay online: [link]"

6. Birthday & Anniversary Messages

The problem: You want to stay top-of-mind with customers, but remembering dates is impossible.

The automation:

- Customer birthday -> Automatic personalized message
- Service anniversary -> "It's been a year since..."
- Seasonal check-ins -> "Time for your spring tune-up?"

Time to measure: Compare staff time before and after a pilot.

Measure: Repeat purchases, campaign costs, and opt-outs.

Sample birthday message:

"Happy Birthday, [Name]! To celebrate, here's 15% off your next visit. Thanks for being a valued customer!"

7. Onboarding Sequences

The problem: New customers need information, but you don't have time to hand-hold everyone.

The automation:

- New customer signed up -> Welcome email series starts
- Day 1: Welcome + what to expect

- Day 3: How to get the most value
- Day 7: Check-in + request feedback

Time to measure: Compare staff time before and after a pilot.

Customer satisfaction increase: Better first impressions

The Set-And-Forget Workflow

Here's a complete automated workflow for a service business:

```
[Lead fills out form]
!
[Added to CRM + tagged + assigned]
!
[Instant notification to sales]
!
[Auto-response sent within 1 minute]
!
[Follow-up sequence starts]
!
[Lead books appointment]
!
[Appointment reminders scheduled]
!
[Service completed]
!
[Review request sent after 24 hours]
!
[Added to nurture sequence for repeat business]
```

This illustrates connected workflow steps. Assign owners, test exceptions, and review messages before enabling automation.

ROI Calculator: Is Automation Worth It?

Calculate Your Time Value

Step 1: What could you bill for an hour of work? \$_____

Step 2: Hours spent on automatable tasks per week: _____

Step 3: Weekly cost of manual work: Step 1 × Step 2 = \$_____

Step 4: Four-week time value: Step 3 × 4 = \$_____. Use actual working weeks for your reporting period.

Hypothetical example, not a customer result:

- Hourly value: \$100
- Admin hours: 16/week
- Weekly cost: \$1,600
- Four-week time value: \$6,400; this is not necessarily cash that can be saved

Compare measured time released with setup, software, usage, and ongoing review costs. Time capacity, revenue, and cash savings are different measures; no payback period is assumed.

Plus: Revenue You're Missing

Look for workflow issues to investigate, without assuming that every issue represents recoverable revenue:

- Leads that fell through the cracks
- No-shows you could have prevented
- Reviews you never asked for
- Repeat customers you forgot about

Getting Started: The 30-Day Automation Sprint

Week 1: Foundation

- [] Choose your CRM/automation platform
- [] Import existing contacts
- [] Connect your website forms

Week 2: Lead Response

- [] Set up instant notifications
- [] Create lead auto-response
- [] Build basic follow-up sequence

Week 3: Appointments

- [] Set up online booking
- [] Create reminder sequence
- [] Add reschedule option

Week 4: Reviews & Retention

- [] Create review request automation
- [] Set up birthday messages
- [] Build basic nurture sequence

At the end of the pilot, review what worked, what needs human attention, and whether to expand.

Common Automation Mistakes to Avoid

1. Over-Automating

Not everything should be automated. Keep automation for:

- Repetitive, predictable tasks
- Time-sensitive responses
- Reminders and follow-ups

Keep human touch for:

- Complex problem-solving
- High-value negotiations
- Emotional situations

2. Set and Forget (Forever)

Automation needs maintenance:

- Review sequences quarterly
- Update templates for relevance
- Check that everything's still working

3. No Personalization

"Dear {FirstName}" isn't enough. Good automation feels personal:

- Reference specific services or products
- Use appropriate tone for your brand
- Segment messages by customer type

4. Ignoring the Data

Automation platforms track everything. Use the data:

- Which emails get opened?
 - Where do people drop off?
 - What drives the most conversions?
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Tools to Get Started

Tools to Evaluate

- Mailchimp: Email marketing; check current plan limits
- Calendly: Appointment scheduling; check current plans
- Zapier: App connections; check supported integrations and costs

Small Business Platforms

- HubSpot CRM: Check current CRM and automation plans
- Mailerlite: Email marketing with automation
- Acuity: Scheduling with reminders

All-in-One Solutions

- NBS: CRM + automation + AI in one platform
 - Go High Level: Marketing automation suite
 - Keap: CRM with advanced automation
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Key Takeaways

- Measure your baseline. Record time spent on tasks before choosing an automation.
 - Seven workflows to evaluate: lead capture, appointment reminders, follow-ups, reviews, payments, birthdays, and onboarding.
 - Measure the business case. Compare verified benefits with total costs over the same period.
 - Start small. One automation working well beats ten half-finished ones.
 - Keep the human touch. Automation handles the routine so you can focus on relationships.
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Your Next Step

Pick ONE automation from this guide-the one that would save you the most time-and implement it this week.

Most businesses that try to automate everything at once get overwhelmed and quit. Businesses that automate one thing, prove the value, then add more? They transform.

Start with one. Prove it works. Then scale.

This guide is Part 2 of The Small Business Growth Toolkit from NBS. For more strategies and to see how NBS can automate your entire customer journey, visit nbsscrm.com