

# Automation Starter Guide for SMEs



## Section 1 – Introduction

Automation is no longer a luxury for big corporations only. Small and medium businesses – especially clinics, beauty salons, and service-based offices – can gain a huge advantage by automating repetitive tasks such as booking, reminders, follow-up, and basic customer support.

This guide is written for business owners and managers, not programmers. You do not need to understand code to understand this guide. The goal is to help you:

- See where automation makes sense in your operations
- Avoid common mistakes when choosing tools
- Start with simple, low-risk workflows
- Build a roadmap you can execute in 30–90 days

By the end of this guide, you should have a clear picture of which processes to automate first, which tools to consider, and how to measure the impact on your business.

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## Section 2 – Mapping Your Current Operations

Before you automate anything, you need a clear picture of how your business currently works.

Take a sheet of paper (or a whiteboard) and write down:

### **How do customers contact you?**

- WhatsApp
- Phone calls
- Instagram / TikTok / Snapchat
- Website forms

### **What happens after the first contact?**

- Who responds?
- How long does it usually take?
- Do you collect any customer data (name, phone, service of interest)?

### **How is a booking or deal confirmed?**

- Is it written in a notebook?
- Saved in WhatsApp only?
- Entered into a calendar or system?

### **What happens after the visit or completed service?**

- Do you send any follow-up messages?
- Do you ask for feedback or reviews?
- Do you re-engage inactive customers?

You cannot design good automation if you do not understand your real-world processes. This mapping exercise is your starting point.

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## Section 3 – What Should You Automate First?

Not every task should be automated on day one. The best candidates are:

- **High volume:** happens many times per day or week
- **Low risk:** if something goes wrong, it is not catastrophic
- **Rule-based:** follows clear steps and conditions

### Typical starting points for SMEs:

- Appointment reminders (WhatsApp / SMS)
- Simple FAQs (location, working hours, basic prices)
- Lead follow-up for people who asked but did not book
- Internal notifications (new lead, new booking, missed call)

You should avoid automating complex decisions at the beginning (e.g. pricing exceptions, legal decisions, medical diagnosis, etc.).

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## Section 4 – Tooling Overview

There are several automation platforms available. Here's a simple comparison:

Tool	Best For	Budget	Technical Skills
n8n	SMEs wanting full control	Low (self-hosted)	Medium
Zapier	Quick setup, many integrations	Medium-High	Low
Make (Integromat)	Visual workflows	Medium	Low-Medium
Custom APIs	Enterprise, complex needs	High	High

### 4 – Automation Tools

• **n8n:** n8n is a powerful automation tool that allows you to build complex workflows using a visual interface or code. It supports a wide range of integrations and can handle both simple and complex tasks.

• **Zapier:** Zapier is a popular automation platform that makes it easy to connect different apps and services. It uses a visual workflow builder to map data between apps and trigger actions.

• **Make:** Make (formerly Integromat) is another visual workflow builder that integrates with many different services. It's great for creating simple to medium complexity workflows.

• **APIs:** APIs (Application Programming Interfaces) allow different software programs to communicate with each other. By using APIs, you can automate tasks by triggering actions based on specific triggers or events.

## Section 5 – 30-Day Action Plan

**Week 1:** Map your processes and define 3 candidate workflows

- Document current customer journey
- Identify bottlenecks and repetitive tasks
- Select 3 high-impact, low-risk workflows

**Week 2:** Choose tools, design the workflows on paper

- Research and compare automation platforms
- Create flowcharts for each workflow
- Define success metrics (KPIs)

**Week 3:** Build and test one or two automations internally

- Set up automation platform account
- Build 1-2 workflows
- Test with internal team only

**Week 4:** Go live with real customers and measure impact

- Launch to a subset of customers
- Monitor performance and errors
- Collect feedback and iterate

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