Top 10 Automations Every Small Team Should Use

Practical ideas for saving hours each week with simple, no-code or low-code workflows.

By PeakOps Automation

Top 10 Automations

1. New client intake → CRM & project board
Automatically push form responses into your CRM and project tool (e.g., Airtable, Trello, Asana).

2. Proposal or contract e-sign alerts
Send instant alerts and update status when a proposal is viewed or a contract is signed.

3. Invoice and payment reminders
Trigger scheduled reminders for unpaid invoices without manual chasing.

4. Weekly metrics rollup
Pull key numbers from Sheets, CRMs, or tools into one summary email or dashboard.

5. Lead routing & follow-up tasks
Assign new leads to owners and create follow-up tasks automatically.

6. File + folder automation
Create standard folders and template files when a new client or project is created.

7. Status update digests
Replace endless 'any update?' messages with daily or weekly status digests.

8. Data cleanup helpers
Normalize names, emails, and IDs automatically instead of manual fixing.

9. Meeting notes → action items
Convert tagged notes (e.g., [ACTION]) into tasks in your task system.

10. Onboarding / offboarding checklists
Trigger repeatable checklists and access changes when people join or leave.

Next Step

Pick ONE workflow from this list and map the steps. Then ask:

• Where are we copying and pasting? • Where are we waiting on someone? • Where is the data already digit

Need help designing or implementing these automations? Visit peakops.club to book a call.