



Your productivity engineers for modern teams.

Top 10 Automations for Small Teams

Small teams often struggle with limited resources and too much manual work. These 10 automations deliver the highest ROI for teams of 2-20 people, helping you save time, reduce errors, and scale without adding headcount.

1. Lead Capture & CRM Entry

Automatically capture leads from forms, emails, or social media and add them to your CRM with proper categorization and tagging. No more manual data entry or lost leads.

Time Saved: 5-10 hours/week

Tools: Zapier, HubSpot, Airtable, Google Forms

2. Email Follow-Up Sequences

Set up automated email sequences that trigger based on customer actions or time delays. Perfect for onboarding, nurture campaigns, or re-engagement.

Time Saved: 3-8 hours/week

Tools: Mailchimp, ActiveCampaign, Gmail, Zapier

3. Invoice & Payment Reminders

Automatically send payment reminders before and after due dates, update accounting systems when payments are received, and flag overdue accounts.

Time Saved: 2-5 hours/week

Tools: QuickBooks, Stripe, PayPal, Xero

4. Meeting Scheduling & Coordination

Let clients and team members self-schedule meetings based on your availability. Automatically send reminders and sync across calendars.

Time Saved: 4-6 hours/week

Tools: Calendly, Acuity Scheduling, Google Calendar

5. Social Media Posting

Schedule and publish content across multiple social platforms from a single dashboard. Repurpose blog posts, auto-share new content, and maintain consistent presence.

Time Saved: 3-7 hours/week

Tools: Buffer, Hootsuite, Later, Zapier

6. Customer Inquiry Routing

Automatically route customer inquiries to the right team member based on keywords, urgency, or customer type. Ensure faster response times.

Time Saved: 5-8 hours/week

Tools: Help Scout, Zendesk, Gmail filters, Slack

7. Weekly Reporting & Dashboards

Auto-generate weekly reports pulling data from multiple sources. Track KPIs, sales metrics, project status, and team performance without manual compilation.

Time Saved: 2-4 hours/week

Tools: Google Data Studio, Tableau, Excel, Airtable

8. File Organization & Backup

Automatically organize, rename, and backup files based on rules. Move completed projects to archives, sync across cloud storage, and prevent data loss.

Time Saved: 2-4 hours/week

Tools: Dropbox, Google Drive, Backblaze, Hazel

9. Task & Project Updates

Sync tasks across project management tools, automatically update stakeholders on progress, and trigger next steps when tasks are completed.

Time Saved: 3-6 hours/week

Tools: Asana, Trello, Monday.com, Slack, Zapier

10. Expense Tracking & Reporting

Automatically capture receipts, categorize expenses, and generate expense reports. Sync with accounting software and flag policy violations.

Time Saved: 2-5 hours/week

Tools: Expensify, Receipt Bank, QuickBooks, Xero

Getting Started

Don't try to automate everything at once. Start with 1-2 automations that will have the biggest impact for your team. Focus on tasks that are:

- Highly repetitive and time-consuming
- Prone to human error

- Currently blocking other work
- Easy to define with clear rules

PeakOps can help you identify the best starting point and build custom automations tailored to your specific workflows. Book a free triage call to get started.

Get Started with PeakOps

Ready to streamline your workflows and save hours every week? PeakOps Automation specializes in building custom automation solutions for busy professionals and small teams.

Website: peakops.com

Email: hello@peakops.com

Schedule: calendly.com/peakops

Our Services:

- Free Workflow Triage Call - Quick audit of your biggest time drains
- Workflow Opportunity Report (\$195) - Detailed analysis and recommendations
- Automation Build (\$495) - Custom automation implementation
- AI Automation Solution (\$995) - Intelligent AI-powered workflows

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