

UK BUSINESS AUTOMATIONS

# Automation Masterclass

Connect Your Apps, Automate Your Workflows,  
and Reclaim Your Time

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# Welcome to the Automation Masterclass

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If you have completed our AI for Business Beginners course (or you are already comfortable using AI tools), you are ready for the next step: **automation**. While AI helps you do individual tasks faster, automation connects your tools together so that tasks happen automatically, without you lifting a finger.

Imagine this: a customer fills in a contact form on your website. Automatically, their details get added to your CRM, a welcome email is sent to them, a task is created for your sales team to follow up, and a notification appears in your team's chat channel. All of that happens in seconds, with zero manual work. That is what automation can do, and this course will teach you exactly how to set it up.

## What You Will Learn

- What automation is and how it works in plain English
- The most popular automation platforms — Make, Zapier, and others
- How to plan and design automations that solve real problems
- Step-by-step walkthroughs of the most common business automations
- How to test, troubleshoot, and maintain your automations
- Advanced techniques: conditional logic, data formatting, and multi-step workflows
- 20 ready-made automation recipes you can build today

## Who This Course Is For

This course is for anyone who wants to stop doing repetitive tasks manually. You do not need to know how to code. If you can use a web browser and follow step-by-step instructions, you can build powerful automations. We recommend completing our AI for Business Beginners course first, but it is not essential.

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## Chapter 1

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# What Is Automation?

Business automation simply means getting technology to perform repetitive tasks for you automatically. Instead of you manually copying information from one place to another, sending routine emails, or updating spreadsheets by hand, an automation does it for you — instantly, accurately, and without getting tired or making mistakes.

## The Building Blocks

Every automation is built from three simple building blocks:

- **Trigger:** Something happens that starts the automation — a new form submission, a new email arriving, or a specific time of day.
- **Action:** The automation performs tasks — create a record, send an email, update a spreadsheet, post a message.
- **Result:** The outcome — your data is updated, your customer is contacted, your team is notified, all without you doing a thing.

A simple example: **When a customer emails you (trigger) → their details are automatically added to your mailing list (action) → they receive a welcome email (result).**

## Why Automation Matters

- **It saves time.** The average small business spends 20+ hours per week on tasks that could be automated.
- **It reduces mistakes.** Humans make errors when copying data between systems. Automations do not.
- **It scales.** Whether you get 10 or 10,000 enquiries, the automation handles them all the same way.
- **It improves customer experience.** Instant responses and consistent follow-ups make your business look professional.

- **It frees your brain.** When you are not bogged down in admin, you can focus on strategy and growth.

■ **Tip:** *Automation is not about replacing your team — it is about removing the repetitive, low-value tasks so they can focus on high-value work that requires human judgement and creativity.*

## Chapter 2

# The Tools: Make, Zapier, and Beyond

There are several platforms that let you build automations without writing any code. These use visual interfaces where you drag, drop, and connect things rather than programming.

## Make (formerly Integromat)

Make is our top recommendation for most UK businesses. It uses a visual builder where you can see your entire automation as a flowchart. You connect modules (which represent apps and actions) together to create workflows called 'scenarios'.

- **Strengths:** Powerful visual builder, excellent value, handles complex logic well
- **Free plan:** 1,000 operations per month — enough to get started
- **Paid plans:** Start from around £8 per month

## Zapier

Zapier is the most well-known automation platform. It is slightly simpler than Make, making it great for straightforward automations. Each automation is called a 'Zap'.

- **Strengths:** 7,000+ app integrations, very beginner-friendly
- **Free plan:** 100 tasks per month (quite limited)
- **Paid plans:** Start from around £16 per month

## Other Tools Worth Knowing

Tool	Best For	Notes
n8n	Self-hosted automation	Free and open-source; needs technical setup
Power Automate	Microsoft 365 users	Included with many Microsoft plans
IFTTT	Simple personal automations	Limited business features

Pabbly Connect	Budget automation	One-time payment option; good value
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### ■ Get Started

**Step 1:** Go to [make.com](https://make.com) and create a free account.

**Step 2:** Also create a free account on [zapier.com](https://zapier.com) so you can compare them.

**Step 3:** Spend 10 minutes exploring each dashboard — just get familiar with the layout.

**Step 4:** Do not build anything yet — we will start building in Chapter 4.

## Chapter 3

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# Planning Your First Automation

Before you start clicking buttons, the most important step is to plan what you want to automate. Jumping straight into building without a plan is the number one reason automations fail or get abandoned.

## The Automation Planning Framework

### Step 1: Identify the Pain Point

What task are you trying to automate? Be specific. 'I want to automate email' is too vague. 'Every time someone fills in our contact form, I manually copy their details into our CRM and send a welcome email' — that is specific enough.

### Step 2: Map the Current Process

Write down exactly what happens right now, step by step. Every manual step you take is a potential automation step. Be thorough — include things like 'I open Gmail, copy the name, switch to the CRM, paste it in...'

### Step 3: Identify the Apps Involved

List every tool or app involved in the process. You will need to check that your automation platform supports these apps. Most popular business tools are supported by both Make and Zapier.

### Step 4: Define the Trigger and Actions

Decide what starts the automation (the trigger) and what should happen next (the actions). Draw it out as a simple flowchart — even rough notes on paper work perfectly.

### Step 5: Consider Edge Cases

Think about what could go wrong. What if a form field is left blank? What if someone submits twice? Planning for these now saves headaches later.



■ **Tip:** *Keep your first automation simple. Start with something straightforward — two or three steps maximum — and build confidence before tackling bigger workflows.*

### ■ Plan Your Automation

**Step 1:** Pick one repetitive task you do at least weekly.

**Step 2:** Write down every manual step involved.

**Step 3:** List the apps or tools involved.

**Step 4:** Draw a simple trigger → action → result diagram.

**Step 5:** Write down one or two things that could go wrong.

## Chapter 4

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# Building Your First Automation

It is time to build! We will walk through creating a real automation: **automatically saving contact form submissions to a Google Sheet and sending a confirmation email.**

## Step-by-Step in Make

### 1. Create a New Scenario

Log into Make and click 'Create a new scenario'. You will see a blank canvas where you will build your automation visually.

### 2. Add the Trigger Module

Click the plus (+) button. Search for your form tool (Typeform, Google Forms, JotForm, or Tally). Select the trigger 'Watch for new responses'. Connect your form account and select the specific form.

### 3. Add Google Sheets

Click the plus button after your trigger. Search for 'Google Sheets', select 'Add a row'. Connect your Google account, select your spreadsheet, and map the form fields to the spreadsheet columns.

### 4. Add the Email Module

Add another module after Google Sheets. Search for 'Email' or 'Gmail', select 'Send an email'. Set the 'To' field to the email from the form submission. Write your confirmation message — you can include the person's name and other form details.

### 5. Test Your Automation

Click 'Run once'. Submit a test entry through your form. Check that all modules show green ticks, verify the Google Sheet has the new row, and confirm the test email arrived.

## 6. Turn It On

Toggle the scenario to 'On'. Your automation is now live and will run automatically whenever someone submits your form.

■■ **Important:** Always test your automations thoroughly before turning them on. Send several test submissions with different data to make sure everything works correctly.

## Chapter 5

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# Essential Automations Every Business Needs

Here are the automations that deliver the biggest impact for most businesses.

## 1. Lead Capture and Follow-Up

When someone shows interest in your business, speed matters. Responding within 5 minutes makes you much more likely to win that customer.

- **Trigger:** New form submission or enquiry
- **Actions:** Save to CRM, send instant acknowledgement email, notify your sales team

## 2. Customer Onboarding

- Send a welcome email with helpful getting-started information
- Add them to your email marketing list
- Create a customer record in your CRM
- Schedule a follow-up check-in for 7 days later

## 3. Invoice and Payment Reminders

- Send a friendly reminder 3 days before the due date
- A firmer reminder on the due date
- An overdue notice 7 days after

## 4. Social Media from Blog Posts

- New blog post published → automatically create and schedule social media posts

## 5. Internal Notifications

- New enquiry → Slack notification to sales team
- Negative review → instant alert to the manager
- Support ticket unresolved for 24 hours → escalation notification

## **6. Data Backup and Syncing**

- Keep customer data consistent across CRM, email platform, and accounting software
- Daily backup of key spreadsheets to cloud storage

## Chapter 6

# Working with Data

As you build more complex automations, you will often need to transform data so it works correctly between different apps.

## Common Data Challenges

- **Date formats:** One app uses DD/MM/YYYY while another uses YYYY-MM-DD
- **Name splitting:** Your form collects a full name but your CRM needs first and last name separately
- **Number formatting:** Prices might come through as text but need to be pure numbers
- **Missing data:** Some fields might be empty and need default values

## Useful Data Functions in Make

Function	What It Does	Example
lower(text)	Converts to lowercase	HELLO → hello
upper(text)	Converts to uppercase	hello → HELLO
trim(text)	Removes extra spaces	' hello ' → 'hello'
split(text, sep)	Splits text into parts	'John Smith' → ['John','Smith']
formatDate	Changes date format	2026-01-15 → 15/01/2026
replace(text,old,new)	Replaces part of text	'£45' → '45'
if(cond, yes, no)	Choose based on condition	If empty → use default

■ **Tip:** Do not try to memorise all the data functions. When you encounter a problem, ask AI: 'How do I split a full name into first and last name in Make.com?'

## Chapter 7

# Conditional Logic

Real business processes often have branches — different things need to happen depending on the situation. This is where conditional logic comes in.

## What Is Conditional Logic?

Conditional logic means your automation makes decisions based on the data it receives. Think of it as 'IF this THEN that':

- IF the enquiry is about pricing → send to the sales team
- IF the enquiry is a complaint → send to customer service
- IF the order is over £500 → apply a discount automatically

## Routers in Make

In Make, you create conditional branches using a 'Router' module. A router takes data from the previous step and sends it down different paths based on conditions you set. Each path has its own filter (the condition) and its own actions.

## Filters

Filters are the conditions on each path. You can use: text equals/contains, number greater/less than, date before/after, and field exists/does not exist. You can combine conditions using AND (all must be true) and OR (at least one must be true).

### ■ Build a Conditional Automation

**Step 1:** Take your lead capture automation and add a router.

**Step 2:** Create two paths: one for urgent enquiries, one for everything else.

**Step 3:** On the urgent path, add an extra notification to the business owner.

**Step 4:** Test with both urgent and non-urgent submissions.



## Chapter 8

# Testing, Troubleshooting, and Maintenance

Building the automation is only half the job. Making sure it keeps working reliably is equally important.

## Testing Best Practices

- **Test with real-looking data:** Use realistic names, emails, and details — not just 'test'.
- **Test edge cases:** Empty fields, very long text, special characters.
- **Test each path:** If you have conditional logic, test every possible branch.
- **Check the output:** Verify data arrived correctly in the destination app.
- **Test at scale:** Submit several entries in quick succession.

## Common Problems and Solutions

Problem	Likely Cause	Solution
Does not trigger	Webhook not connected	Re-test the connection
Wrong data in fields	Fields mapped incorrectly	Review field mapping
Emails not sending	Account disconnected or limit reached	Reconnect; check limits
Duplicate entries	Running multiple times	Add duplicate check
Stops working suddenly	Credentials expired	Reconnect the app

## Monthly Maintenance Checklist

- Check automation logs for errors or failures
- Verify all app connections are still active
- Review any paused or failed automations

- Check usage against your plan limits
- Update automations if your processes have changed

## Chapter 9

# Advanced Automation Strategies

## Multi-Step Workflows

Real business processes often involve many steps. In Make, a single scenario can have dozens of modules. Build incrementally — get the first few steps working, then add more.

## Error Handling

In Make, you can add error handlers that catch failures and take alternative action — for example, sending you a notification when something goes wrong, or saving failed data for manual processing.

## Webhooks

Webhooks let one app send real-time data to another instantly, rather than your automation checking periodically. This means faster response times and less wasted processing.

## Using AI Inside Your Automations

This is where everything comes together. You can include AI as a step within your automations:

- **Customer enquiry** → **AI generates a draft response** → **sends for your approval**
- **New review** → **AI analyses sentiment** → **routes to marketing or customer service**
- **Document uploaded** → **AI summarises key points** → **adds summary to project management tool**

■ **Tip:** *The combination of automation and AI is incredibly powerful. Automation handles the 'plumbing' — moving data between apps — while AI handles the 'thinking' — generating content and making judgements. Together they can handle workflows that previously required significant manual effort.*

## Chapter 10

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# Your Automation Roadmap

### Days 1-14: Foundation

- Set up accounts on Make and/or Zapier
- Build your first simple automation (form → spreadsheet → email)
- Test thoroughly and turn it on

### Days 15-30: Core Automations

- Build lead capture and follow-up automation
- Set up customer onboarding sequence
- Create internal notification automations

### Days 31-45: Refinement

- Add conditional logic to existing automations
- Set up error handling
- Build invoice reminder automation

### Days 46-60: Advanced

- Integrate AI into one or more automations
- Build a multi-step workflow for a complex process
- Set up monthly maintenance routine

When you are ready to go further, our **Scale With AI** course covers advanced strategies for growing your business. Visit [ukbusinessautomations.com](https://ukbusinessautomations.com) to learn more.

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# Bonus: 20 Ready-Made Automation Recipes

Here are 20 automations you can build today. Each includes the trigger and actions.

## 1. New Lead Alert

Form submission → Google Sheet + Slack notification + confirmation email

## 2. Welcome Sequence

New customer → welcome email → tips email (day 3) → offer email (day 7)

## 3. Invoice Reminders

Invoice created → reminders at -3 days, due date, and +7 days

## 4. Review Monitor

New Google review → Slack alert → route by sentiment

## 5. Blog to Social

New blog post → LinkedIn + Facebook + Twitter posts

## 6. Meeting Follow-Up

Calendar event ends → send follow-up email with notes template

## 7. Customer Feedback

Project completed → wait 2 days → send satisfaction survey

## 8. Task Assignment

New Trello card → assign team member by label → notify them

## 9. Proposal Generation

New deal in CRM → generate proposal from template → email to customer

## 10. Daily Data Backup

Midnight daily → export CRM data → save to Google Drive

## 11. Expense Tracking

Receipt email → extract details → add to expense spreadsheet

## 12. Appointment Reminders

24hrs before → SMS reminder; 1hr before → email reminder

**13. Support Escalation**

Ticket open 24+ hours → notify manager → mark as urgent

**14. Content Calendar**

Monday 9am → pull topics → create task cards → assign to team

**15. Competitor Monitor**

Daily → check competitor site → email summary of changes

**16. Employee Onboarding**

New employee → create accounts → send welcome pack → assign training

**17. Stock Alerts**

Stock below threshold → email purchasing team → create reorder task

**18. Weekly Reports**

Friday 5pm → pull data → format summary → email to management

**19. AI-Powered Replies**

New email → AI drafts reply → team approval → auto-send

**20. Multi-Channel Sync**

CRM update → sync to email platform + accounting software

# Congratulations!

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You have completed the Automation Masterclass. You now have the skills to connect your apps, automate your workflows, and reclaim hours of your week.

## ■ Book a Free 30-Minute Consultation

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