100 smart ways to automate your business

Below are practical, highly detailed, instructions on how to implement 100 bite-size automations using tools like n8n/Zapier/Make, GoHighLevel/HubSpot, Airtable/Notion, Slack/Teams, Stripe/QuickBooks/Xero, Clarity PPM/Asana/ClickUp/Jira, etc. Mix and match to fit your stack.

Lead gen & marketing (1–10)

1. Auto-capture every form/DM into a CRM with source + UTM tagging.
2. Enrich new leads with firmographics (Clearbit/ZoomInfo) on entry.
3. Lead scoring that updates in real time from site behavior and email clicks.
4. Route hot leads to reps instantly via Slack/Teams with “claim” buttons.
5. Spin up campaign-specific landing pages + subdomains programmatically.
6. Auto-generate social posts from new blogs (title, summary, hashtags).
7. Repurpose long videos to shorts + captions, then schedule to socials.
8. Daily ad budget pacing alerts with auto-pause if CPA > threshold.
9. Content calendar → auto brief creation → AI first draft → editor queue.
10. Run A/B tests that auto-promote the winner after statistical significance.

Sales & RevOps (11–20)

11. Auto-create Opportunities from qualified inbound + assign owner by rules.
12. Two-way calendar booking that inserts Zoom links + reminders.
13. Proposal generation from a template (pricing, SOW, case studies).
14. E-signature to CRM sync with stage change + tasks for onboarding.
15. Quote approvals via Slack buttons and tiered approver logic.
16. Renewal pipeline that auto-creates opps 120/90/60/30 days out.
17. Dunning sequences for failed payments with smart retries.
18. “Last touch” attribution snapshots at opportunity creation/close.
19. Voice notes to CRM summaries using AI transcription + key fields.
20. Daily pipeline hygiene bot nudging reps on missing next steps.

Customer success & support (21–30)

21. Auto-onboarding checklists triggered by deal close (client + internal).
22. Provision accounts, workspaces, and permissions from one intake form.
23. Personalized welcome emails with product tours based on plan/tier.

24. NPS/CSAT surveys after milestones; route detractors to human follow-up.
25. Ticket triage: classify, set priority, and suggest responses with AI.
26. Knowledge base auto-updates from resolved tickets with high search volume.
27. Health scoring that blends usage, tickets, NPS, and billing signals.
28. Churn risk alerts to CSMs with “save playbook” links.
29. Quarterly Business Review (QBR) decks auto-assembled from product data.
30. Customer webinar invites auto-targeted by feature adoption gaps.

Operations & fulfillment (31–40)

31. Auto-generate POs when inventory dips below reorder points.
32. Shipment label creation + customer notifications + tracking page.
33. Returns/RMA self-service with auto refunds or exchanges by policy.
34. Vendor onboarding workflow with required docs + W-9 collection.
35. SLA timers and escalations for internal service desks.
36. Maintenance schedules for equipment with IoT alerts to technicians.
37. Project templates that spin up tasks, owners, and timelines on intake.
38. Capacity planning: auto-assign work based on skills + current load.
39. Daily ops digest: KPIs, exceptions, and blockers to Slack/Email.
40. Change-request approvals with audit trail and roll-back plan attachment.

Finance & accounting (41–50)

41. Auto-invoice on milestone/subscription events with branded PDFs.
42. Reconcile payouts from Stripe/Shopify to bank deposits automatically.
43. Expense capture from receipts → OCR → category → approval → ERP.
44. Month-end close checklist with dependencies and due-date nudges.
45. Cash flow forecast that pulls AR/AP + expected collections.
46. Vendor bill intake from email → 3-way match → schedule payment.
47. Usage-based billing meters: track, aggregate, and invoice automatically.
48. Sales tax/VAT calculation and filing prep from transaction data.
49. Budget vs. actuals alerts when a line exceeds threshold.
50. Credit hold automation for overdue accounts with escalation path.

HR & people ops (51–60)

51. Offer letter + e-signature + background check in one flow.
52. Day-1 onboarding: accounts, groups, hardware tickets, and intros.
53. Role-based access control automation (grant/revoke on hire/exit).

54. Time-off requests sync to calendars and staffing boards.
55. Payroll changes (comp, title, manager) synced to HRIS and Slack directory.
56. Performance review cycles with prompts and evidence capture.
57. Learning paths triggered by role/skill gaps; track completions.
58. Org chart auto-generated from HRIS with team health indicators.
59. Recruiting: parse resumes → score → schedule screens automatically.
60. Exit offboarding: asset returns, account deprovisioning, knowledge transfer.

IT & security (61–70)

61. SSO provisioning via SCIM; automated group membership by attributes.
62. Just-in-time admin access with auto-revert and change logging.
63. Endpoint compliance checks with auto-quarantine for noncompliance.
64. Patch management windows with maintenance page + status updates.
65. Phishing simulations + remedial training assignments.
66. Incident response runbooks that auto-create war rooms and roles.
67. Backup jobs with integrity checks and restore drills on a cadence.
68. Vulnerability scan → ticket creation → owner assignment by service.
69. Certificate expiration alerts and auto-renewals where supported.
70. Data loss prevention: detect/anonymize PII in logs and exports.

Product & engineering (71–80)

71. PR templates that enforce checklists (tests, screenshots, changelog).
72. CI/CD pipelines with automated tests, security scans, and deploy gates.
73. Feature flag rollouts + auto-rollback on error spike thresholds.
74. Error monitoring to Slack with suggested owners by code ownership.
75. User feedback intake to product board with deduping and tagging.
76. Release notes auto-compiled from merged PRs + product copy polish.
77. Service level objectives (SLO) alerts with burn rate paging.
78. Synthetic monitoring of key user flows with screenshots on failure.
79. API usage anomaly detection and throttling rules.
80. Usage telemetry → cohort analysis → in-app nudges for underused features.

Data & analytics (81–90)

81. Event tracking governance: auto-validate schemas before deploy.
82. ETL/ELT pipelines with data quality checks and alerts.
83. KPI dashboard refreshes with “what changed & why” summaries.

84. Weekly growth/accounting executive brief auto-generated from BI.
85. Lead source deduplication and identity resolution (CDP).
86. Forecast models (revenue, churn, inventory) retrain on schedule.
87. Anomaly detection on ops metrics (orders, refunds, tickets).
88. Cohort retention reports delivered to owners with action prompts.
89. Data access requests auto-approved within least-privilege policies.
90. Auto-document data lineage and owners for compliance and audits.

Admin, legal & general (91–100)

91. Contract lifecycle: intake → template selection → redline → approval.
92. NDAs auto-sent before meetings booked with external parties.
93. Policy updates pushed for e-acknowledgement; reminders to stragglers.
94. Meeting notes bot: record, transcribe, summarize, and taskify.
95. Company-wide “ask IT/HR/Finance” intake with routing and SLAs.
96. Asset inventory (devices, licenses) with renewals and true-ups.
97. Facilities requests (badges, desks) auto-assigned with calendars updated.
98. Compliance evidence collection (SOC2/ISO) tied to control owners.
99. Knowledge base governance: stale page detection → owner ping.
100. Executive scorecard email every Monday with goals, KPIs, and risks.