The IT Consultant's Automation Handbook

Dele Tosh
Director, Protomated.com

Contents

0.1 Why This Book, Why Now? 1
0.2 What You'll Learn 2
0.3 How to Use This Book 2

1 Automation Fundamentals for IT Consultants 3
1.1 Introduction 3
1.2 Quick Win: AI-Powered Email Classification with n8n and OpenAI 3
1.2.1 Why This Matters 3
1.3 Setting Up Your Secure Automation Environment 4
1.3.1 Installing n8n using Docker 4
1.4 Creating Your Email Classification Workflow 6
1.4.1 Step 1: Connect to Gmail 6
1.4.2 Step 2: Integrate OpenAI for Content Analysis 6
1.4.3 Step 3: Update Email Labels 8
1.5 Putting It All Together 8
1.6 Real-World Impact: A Case Study 8
1.7 Next Steps and Community Support 9

List of Figures

1.1 Cluttered inbox vs. Organized, classified inbox 3
1.2 The Complete OAuth config screen 7
1.3 OpenAI node configuration 8
1.4 Final workflow diagram 8
1.5 Before and after screenshots of a Gmail inbox 8

Introduction: The New Era of IT Consulting

If you're running a small IT consulting firm, you're likely all too familiar with the daily grind: drowning in manual tasks, struggling to meet client deadlines, and watching more tech-savvy competitors zoom past you. You know you need to innovate, but finding the time feels impossible. Sound familiar?

You're not alone. The IT consulting landscape is shifting rapidly, and small firms are feeling the pressure. But here's the good news: you're holding the key to not just surviving, but thriving in this new era.

0.1 Why This Book, Why Now?

The consulting world is undergoing a seismic shift. According to Deloitte's recent report, "Unleashing value from digital transformation: Paths and pitfalls," the days of strategy-only consulting are numbered. Clients now demand execution, and technology is at the heart of it all.

Consider this: 30 years ago, classic strategy work made up 60-70% of consulting engagements. Today? It's down to a mere 20%. The message is clear: consultants who can't deliver tangible, tech-driven results will be left behind.

But here's where it gets exciting for small firms like yours. The report also highlights a crucial trend: the rise of specialist boutique firms. With the right tools and knowledge, you can deliver outcomes that rival the big players, at a fraction of the cost.

This is where automation comes in. It's not just a buzzword; it's your ticket to:

- Boosting productivity by eliminating time-consuming manual tasks
- Consistently meeting (and exceeding) client deadlines
- Taking on more projects without burning out
- Positioning yourself as an innovation leader
- Finally achieving that elusive work-life balance

0.2 What You'll Learn

This book is your practical guide to leveraging no-code automation tools to revolutionize your IT consulting practice. We'll focus on three powerful platforms: n8n, nocodb, and budibase. By the time you finish this book, you'll know how to:

1. Automate repetitive tasks to free up your time for high-value work
2. Deliver unprecedented value to clients (and find new ways to monetize your automation skills)
3. Scale your practice without working 80-hour weeks
4. Integrate cutting-edge technologies like generative AI and cloud computing into your solutions

0.3 How to Use This Book

Whether you're a complete newcomer to automation or you've dabbled a bit, this book is designed to meet you where you are. Each chapter builds on the last, providing a mix of theory, practical examples, and hands-on exercises.

We'll start with quick wins you can implement today, then progress to more advanced strategies. By the end, you'll have a comprehensive 90-day plan to transform your practice.

Don't just read passively. The real magic happens when you apply these concepts to your own business. So grab your laptop, roll up your sleeves, and get ready to join the ranks of innovative, future-proof IT consultants.

Ready to stop drowning in busywork and start leading the pack?

Let's dive in.

Chapter 1

Automation Fundamentals for IT Consultants

1.1 Introduction

As a small IT consulting firm, your time is your most valuable asset. In this chapter, we'll dive into a practical automation example that can save you hours each week and revolutionize how you handle client communications.

1.2 Quick Win: AI-Powered Email Classification with n8n and OpenAI

Let's start with a common pain point: the overflowing inbox. We'll create an automation that reviews and classifies emails based on their content, helping you prioritize and respond more efficiently.

1.2.1 Why This Matters

[@TODO: ILLUSTRATATE: Cluttered inbox vs. Organized, classified inbox]

Figure 1.1: Cluttered inbox vs. Organized, classified inbox

Imagine starting your day with a perfectly organized inbox, where emails are automatically sorted into categories like:

- Urgent client issues
- Project updates
- New business inquiries
- Invoicing and payments
- Administrative tasks

This automation will make that a reality, allowing you to:

- Respond to critical issues faster
- Prioritize your workday more effectively
- Ensure no important client communication slips through the cracks

1.3 Setting Up Your Secure Automation Environment

Before we dive into the automation itself, let's set up n8n locally. Unlike cloud-based tools like Zapier, n8n can be self-hosted, ensuring your sensitive client data never leaves your control.

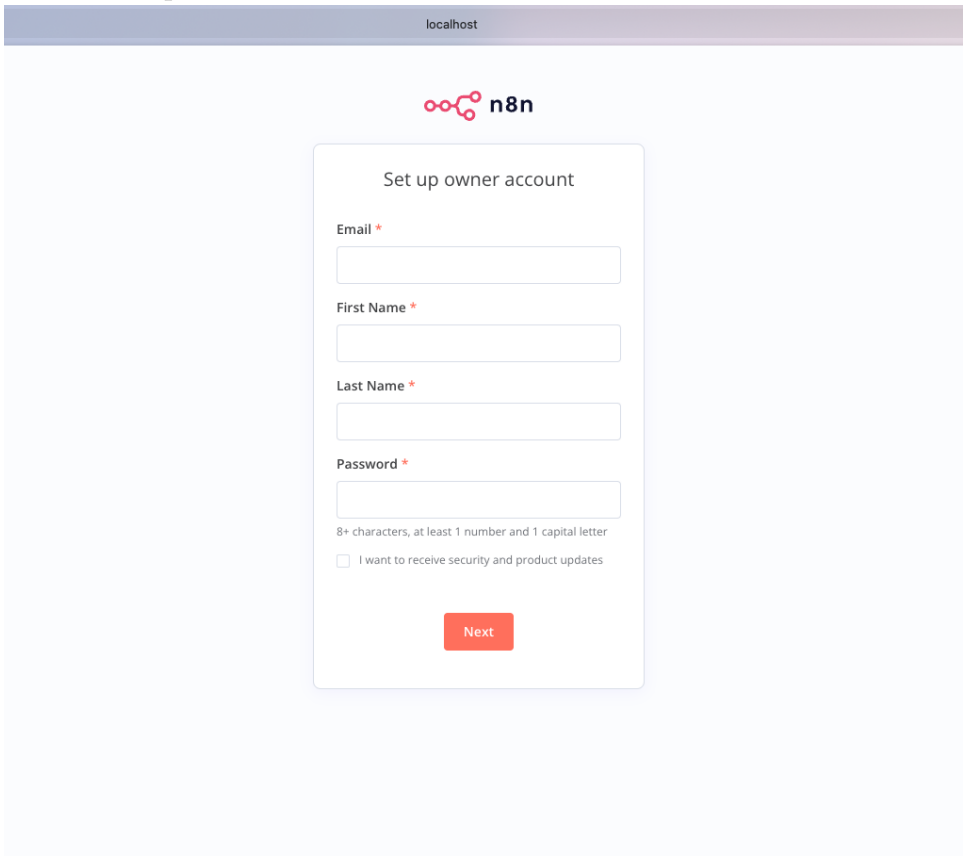
1.3.1 Installing n8n using Docker

We'll use Docker for a consistent setup across all platforms.

1. Install Docker:
    - For Windows: Docker Desktop for Windows
    - For macOS: Docker Desktop for Mac
    - For Linux: Docker Engine
2. With the installation complete, open a terminal or command prompt and run:

```
docker run -it --rm \
  --name n8n \
  -p 5678:5678 \
  -v ~/.n8n:/home/node/.n8n \
  n8nio/n8n
```

3. Open your browser and navigate to `http://localhost:5678`, you should see the setup screen:



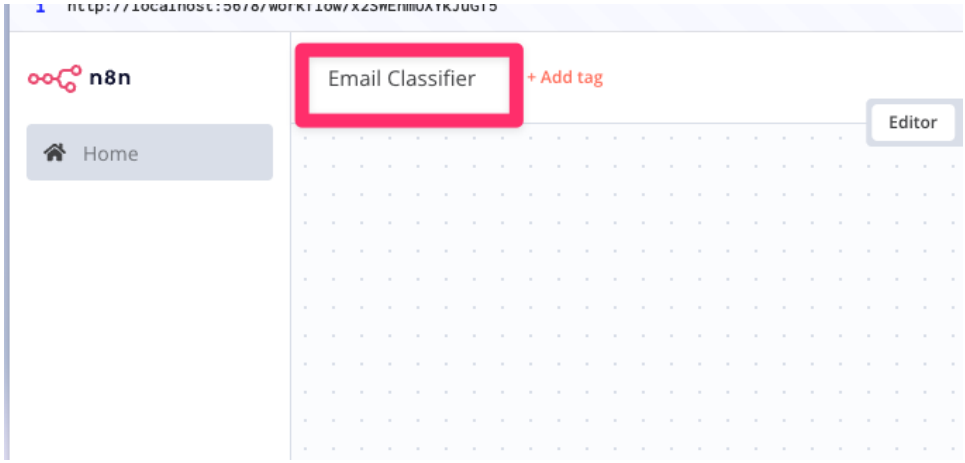
4. Fill in your details and hit "Next"

If you run into issues in your setup and want to restart from the beginning, from your terminal, delete the docker n8n directory in /.n8n. Then re-run the docker command

1.4 Creating Your Email Classification Workflow

Now that n8n is running, let's build our automation:

1. In the n8n dashboard, click "Start from scratch"
2. Rename "My Workflow" in the top left corner to "Email Classifier"



1.4.1 Step 1: Connect to Gmail

1. Hit the "Add first step..." and Search for "Gmail" and select "On Message Received"
2. Select the "Credential to connect with" then choose "- Create New Credential -"
3. Follow the OAuth process to connect your Gmail account

1.4.2 Step 2: Integrate OpenAI for Content Analysis

Before we proceed, let's securely set up our OpenAI API access:

1. Go to OpenAI's website and sign up or log in
2. Navigate to the API section and create a new API key

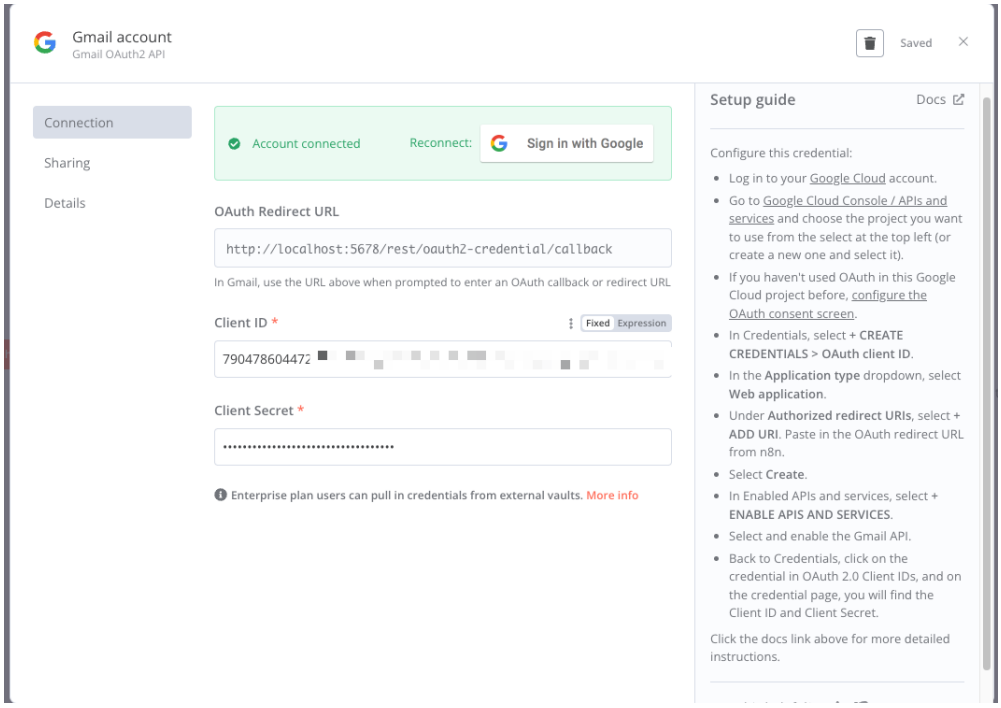


Figure 1.2: The Complete OAuth config screen

3. In n8n, go to Settings ¿ Credentials and add a new credential of type "OpenAI API"
4. Paste your API key and save

Now, let's add the OpenAI node to our workflow:

1. Add a new "OpenAI" node
2. Connect it to the Gmail trigger node
3. Configure it as follows:
    - Resource: Completion
    - Model: gpt-4o
    - Prompt: "Classify the following email into one of these categories: Urgent client issue, Project update, New business inquiry, Invoicing and payment, Administrative task. Email content: {{$json["body"]}}"

-

[INSERT IMAGE: OpenAI node configuration]

Figure 1.3: OpenAI node configuration

1.4.3 Step 3: Update Email Labels

1. Add another "Gmail" node
2. Connect it to the OpenAI node
3. Configure it to add a label based on the classification from OpenAI

[@TODO: ILLUSTRATE: Final workflow diagram]

Figure 1.4: Final workflow diagram

1.5 Putting It All Together

Activate your workflow, and watch as your emails are automatically classified and labeled!

[@TODO: ILLUSTRATE: Before and after screenshots of a Gmail inbox]

Figure 1.5: Before and after screenshots of a Gmail inbox

1.6 Real-World Impact: A Case Study

Meet Sarah, an use-case IT consultant running a 5-person firm. Before implementing this automation, Sarah spent 2 hours each day sorting through emails. After setting up the AI-powered classification:

- Sarah's email processing time dropped to 30 minutes a day

- Her team's response time to urgent client issues improved by 60%
- They never missed a new business inquiry, increasing potential leads by 25%

By reclaiming 7.5 hours each week, Sarah was able to take on two additional clients without hiring new staff.

1.7 Next Steps and Community Support

Ready to implement this automation or explore more advanced use cases? Join our vibrant community of IT consultants and automation enthusiasts on Discord:

JOIN NOW: Business Automators Discord Server

In our community, you can:

- Get help troubleshooting your automations
- Share your own automation success stories
- Network with other forward-thinking IT consultants
- Get direct access to me, Dele Tosh, for personalized advice

Remember, automation is a journey, not a destination. Start with this email classification workflow, then explore how you can automate other aspects of your consulting practice. In the next chapter, we'll dive deeper into the no-code tools every IT consultant should master.