WHAT TO AUTOMATE FIRST

Automate the work that *makes customers wait.*

Don't start with the tool. Start with the task that costs you trust. Score each task below from 0 to 2 on each question. The highest total is your first automation.

QUESTION	0	1	2
Does a customer wait while this happens?	Never	Sometimes	Every time
How often does it happen?	Monthly	Weekly	Daily
Is it copy and paste work?	No	Partly	Fully
Do mistakes happen?	Rarely	Sometimes	Often

YOUR SCORING SHEET

TASK	WAIT	OFTEN	COPY	ERRORS	TOTAL

HOW TO READ IT

7 or 8: automate this month. 5 or 6: next in line. 4 or less: leave it manual for now.

TEN COMMON PLACES TO START

- [ ] **Payment confirmations**
  Bank alerts read and logged for the team in seconds, so no one chases a director.
- [ ] **Lead routing**
  Every enquiry from your site, WhatsApp and Instagram lands with one salesperson, right away.
- [ ] **First reply to new enquiries**
  An instant, friendly reply with prices or next steps, even at midnight.
- [ ] **Bookings and reminders**
  A booking link, then reminders the day before and an hour before.
- [ ] **Invoices and receipts**
  Sent automatically when a deal closes or a payment lands.
- [ ] **Follow-up after a quote**
  A check-in after two days and again after a week, so no deal goes quiet.
- [ ] **Testimonial requests**
  A short message asking for a review when a project ends.
- [ ] **Weekly numbers**
  Sales, leads and payments summed up in one message every Monday.
- [ ] **New client onboarding**
  Welcome message, forms and next steps sent the moment they pay.
- [ ] **Social DM keywords**
  Someone comments or DMs a word, and gets the right resource instantly.

Tools that do most of this: n8n, Zapier or Make for the logic, Google Sheets for the record, ManyChat for Instagram, Calendly for bookings, and OpenAI when a message needs reading or writing.

Want me to build your first one? *Let's talk.*

Automation is the Build step of the 3B System.

DM "SYSTEM"