

A 7-STEP METHOD (WEEKEND-SIZED)

Your First Automation

You don't need a consultant to automate your first task — you need a method. This is the exact process we use with clients, sized down to something you can do yourself this weekend.

01 The method

- 1 Pick by pain × frequency**

List 5 tasks you dread. Score each 1-5 on how often it happens and how annoying it is. Highest product wins.

Good first picks: quote follow-ups, appointment reminders, copying form entries into a spreadsheet or CRM.
- 2 Write it as "when X, do Y"**

Every automation is a trigger and actions. If you can't phrase it that way, the task isn't defined enough yet — that's the real work.

Example: "WHEN a form is submitted → add row to sheet, create CRM contact, email me a summary."
- 3 Do it manually one more time — and film it**

Screen-record yourself doing the task once. The recording is your spec: every click is a step the automation must replicate.
- 4 Build it in a no-code tool**

Zapier is the gentlest start (Make is more powerful, n8n the most capable). Pick your trigger app, add actions one at a time, test after each.
- 5 Run it in shadow mode for a week**

Let the automation run but keep doing the task manually. Compare outputs daily. This is how you catch the weird edge cases safely.
- 6 Add a failure alert**

One extra step: "if this fails, message me." An automation that fails silently is worse than no automation.

Hand it the keys — and log the hours

Stop doing it manually. Note what it used to cost you per week. That number is your business case for automating the next one.

The 4 traps that derail first automations

- **Starting with the hardest workflow.** Win small first; complexity comes later.
- **Automating a broken process.** If the manual version is chaos, automation makes faster chaos. Tidy first.
- **No human fallback.** Decide up front what happens when the automation hits something unexpected.
- **Set-and-forget.** Check the logs weekly for the first month. Tools update, APIs change, forms get edited.

Rather skip to the finished version?

This method works — and it's also literally our job. Book a free 30-minute call: we'll pick your highest-value automation together and quote what building it properly looks like.

[Book a free call →](#)