NORTHLOOP

Reclaim 10 Hours a Week

7 automations every small business needs, with the exact steps, tools, and honest effort level for each.

By Mansi More, Northloop

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WHAT'S INSIDE

- Why most small businesses have a follow-up problem, not a sales problem
- 7 automations, each with the exact steps, tools, and honest effort level
- Where to start: the one rule for picking your first automation

Why this guide exists

Most small businesses do not have a sales problem or a marketing problem. They have a follow-up problem, a reminders problem, a paperwork problem. The same tasks repeat every day, eat hours every week, and get done inconsistently because humans are busy.

Automation fixes exactly that: software doing the repetitive steps the same way, every time. This guide covers seven automations that work for almost any small business. For each one you get the problem it solves, how it works step by step, the tools typically used, and an honest read on the effort involved.

The one rule
Automate the task you do most often, dread most, or mess up most. Start with one. Get it working. Then add the next.

The 7 automations

1 Instant lead follow-up

The problem: A new inquiry sits in your inbox for hours while you are with customers. By the time you reply, they have booked someone else.

How it works:

- Inquiry arrives from your form, DM, or phone system.
- You get an instant alert with the details.
- The lead immediately gets a personal reply: their name, what they asked about, and a clear next step.
- If they go quiet, two polite follow-ups go out over the next week.
- Every reply lands in your inbox or CRM, so nothing is lost.

Typical tools: Zapier or Make for the plumbing, your CRM or a shared inbox, Twilio or email for messages, an AI model to draft the first reply.

Effort: Weekend project for a simple version. Hire a specialist if you want AI-drafted replies and CRM routing.

2 Missed-call text-back

The problem: You cannot answer every call. Most callers never leave a voicemail. They just call the next business on the list.

How it works:

- A call goes unanswered.
- Within a minute, the caller gets a text: sorry we missed you, how can we help?
- Their reply starts a conversation you can pick up whenever you are free.
- After hours, the message adjusts: we open at 9, want a call back in the morning?

Typical tools: Twilio, OpenPhone, or GoHighLevel. A simple chatbot can handle the reply thread.

Effort: Weekend project.

3 Appointment reminders and no-show recovery

The problem: No-shows cost you the slot and the revenue. Manual reminder calls eat your afternoons.

How it works:

- The booking is confirmed by text and email.
- Reminders go out 48 hours, 24 hours, and 2 hours before, each with confirm, reschedule, and cancel options.
- A cancellation triggers your waitlist or sends a rebook link.
- A no-show triggers a friendly recovery message the next morning, then a check-in a week later.

Typical tools: Your booking system (Calendly, Square, Vagaro), Twilio or email, Make or Zapier to connect them.

Effort: Weekend project if your booking tool has reminders built in. Hire a specialist for the recovery sequences.

4 Review requests after every visit

The problem: Happy customers rarely review on their own. Your review count stays flat while competitors pull ahead.

How it works:

- Two to four hours after the visit or delivery, the customer gets a short thank-you text.
- It asks one question: how was it, with a simple 1 to 5 tap.
- Scores of 4 to 5 get your Google review link.

- Lower scores go to a private feedback form instead, so you hear about problems before the internet does.

Typical tools: Twilio or email, a simple form, Make or Zapier. No AI needed for the basic version.

Effort: Weekend project.

5 Invoice chasing

The problem: Late payments strangle cash flow, and chasing them feels awkward, so it keeps slipping.

How it works:

- The invoice goes out with a payment link.
- A gentle reminder goes out 3 days before it is due.
- Firmer reminders go out at 7 and 14 days overdue, each with the payment link.
- At 30 days, you get flagged to call personally. Every message is polite, consistent, and automatic.

Typical tools: Your invoicing tool (QuickBooks, Xero, Stripe), email, Zapier or Make.

Effort: Weekend project.

6 FAQ and support chatbot

The problem: You answer the same ten questions by email, DM, and phone, every single day.

How it works:

- A chat widget goes on your website, and optionally WhatsApp or Instagram.
- It answers from your real FAQs, pricing, hours, and policies.
- It books appointments and captures lead details when you are closed.
- Anything it cannot answer goes straight to you, with the full transcript.

Typical tools: An AI model, a chatbot builder or custom code, your booking link and FAQ documents.

Effort: Hire a specialist for one that actually works. Cheap DIY bots frustrate customers.

7 Inquiry triage: one inbox for everything

The problem: Leads scatter across email, Instagram DMs, contact forms, and voicemail. Things fall through the cracks.

How it works:

- Every channel feeds into one shared inbox or CRM.
- New inquiries are labeled automatically by type: booking, quote, support.
- A draft reply is prepared for each one.

- You approve, edit, or send everything from one place each morning.

Typical tools: A CRM (the HubSpot free tier works), Make, Zapier, or n8n, an AI model for drafting and labeling.

Effort: Hire a specialist. Worth it: this is the backbone the other six plug into.

Where to start

Do not build all seven. Pick the one that costs you the most each week: the most no-shows, the most missed calls, the most unpaid invoices. Build that one first, run it for a month, then add the next. Automation compounds.

> **Free 30-minute workflow audit**
> Want a specialist to map this for your business? Northloop will find your biggest time leaks and hand you a plan, whether or not you hire us. Book at northloop.vercel.app