

Small Business

Automation Playbook

Stop trading hours for dollars. Start building systems that work while you sleep.

From Nicole's desk: After 10+ years helping 50+ businesses automate, the pattern is always the same: owners are drowning in repetitive tasks that should have been automated months ago. This playbook is your starting point. The businesses in my portfolio — like Celebration Yards and WISE Nonprofit — are saving 500+ collective hours a month because they took these steps.

Why Automation Matters Right Now

The average small business owner spends 40% of their week on tasks that could be automated — that's 16+ hours every single week. At CTS, we've seen an average 85% ROI increase in clients who commit to a proper automation strategy. The question isn't whether you can afford to automate. It's whether you can afford not to.

At Certified Tech Solutions, we partner with Automation on a Mission (AOAM) to give small businesses enterprise-grade automation at a price point that makes sense — starting at \$127/month for a platform that replaces 10+ tools you're probably already paying for separately.

The 4 Zones of Business Automation

Before automating anything, map your recurring tasks into these four zones:

Zone 1: Communicate

Email responses, appointment reminders, follow-up sequences, review requests

Zone 2: Capture

Lead forms, intake questionnaires, payment collection, e-signatures

Zone 3: Convert

Nurture sequences, proposal delivery, booking workflows, onboarding triggers

Zone 4: Coordinate

Task assignment, team notifications, project tracking, reporting dashboards

High-ROI Automation Wins

These are the automations CTS implements most often — and they deliver results the fastest:

Instant Lead Response

Respond to every web inquiry within 5 minutes, automatically. This alone can double your conversion rate. AOAM makes this a 10-minute setup.

Appointment Reminders

Automated SMS + email 24 hours and 1 hour before appointments cuts no-shows by 50–80%. Celebration Yards saw this result in week one.

Onboarding Automation

The moment a client pays, they automatically receive a welcome email, intake form, and first-step instructions. No manual handoff required.

Review Requests

Triggered 3 days after project delivery — when the experience is fresh. WISE Nonprofit used this to build their online presence after each event.

Re-engagement Sequences

Leads tagged as quiet after 30/60/90 days receive an automatic 'checking in' sequence — bringing back business you'd otherwise lose silently.

Invoice & Payment Triggers

Send invoices on project milestones. Late payment reminders go out automatically so you're never the one chasing money.

Your Automation Stack (What CTS Recommends)

Nicole's philosophy: one integrated platform beats five disconnected apps every time. Here's the lean stack we build for clients through Automation on a Mission (AOAM):

Platform Component	Business Impact
CRM + Pipeline Management	All contacts, deal stages, and communication history in one place
Email + SMS Automation	Multi-channel sequences triggered by behavior, not just time
Scheduling + Booking	Clients book directly on your calendar; reminders go out automatically
Funnels + Landing Pages	High-converting pages built and tested inside the same platform
Invoicing + Payments	Collect payment at booking, on milestones, or on delivery

Reporting Dashboard	See pipeline value, open rates, and conversion rates at a glance
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Nicole's rule: Never automate a broken process. Fix the workflow on paper first, test it manually twice, then automate it. A bad process automated at scale is a disaster at scale.

Your First 30 Days

Week 1	Do a 30-min task audit. List your 5 most repetitive tasks and time how long each takes.
Week 2	Set up one automation: instant lead response. Test it from both sides — as sender and recipient.
Week 3	Build your onboarding flow: intake form → welcome email → next steps → calendar invite.
Week 4	Review, refine, and identify the next highest-impact automation to add.

Ready to take the next step? Nicole's education-first approach means you don't just get automation built — you understand it. Schedule a free consultation and we'll map your first three automations together. Visit ctsolutionsonline.com/contact or take the free Tech Chaos → CALM™ Survey at ctsolutionsonline.com/chaos-to-calm-score