Bridge Imara

FREE GUIDE

Getting Started with Automation

Let your tools do the repeat work, and save hours every week. No tech skills needed.

Automation means setting your tools up so the same steps happen by themselves every time: a form is filled in, and the details land in your spreadsheet, a thank-you email goes out and you get a reminder to follow up. This guide helps you pick the right tasks, see how much time they cost you, and plan your first automation safely. It takes about 20 minutes. You can type straight into it.

Step 1: Is this task worth automating?

Think of one task you do often. Tick each statement that is true. If you tick all four, it is a strong candidate.

- ☐ It happens at least once a week.
- ☐ The steps are the same every time.
- ☐ It does not need a person to make a judgment or decision.
- ☐ The information is already digital (a form, an email, a spreadsheet or an app).

If you ticked three or fewer, write the steps down first and make them consistent. A messy process that is automated just makes the mess happen faster.

Step 2: How much time do these tasks cost you?

List the repeat tasks you or your team do. Hours a year = minutes each time × times a week × 52 ÷ 60.

Task	Minutes each time	Times a week	Hours a year	Worth automating?
Example: copy new enquiries into the sales sheet	5	10	43	Yes, start here

Step 3: How every automation works

Every automation, simple or advanced, has the same three parts:

Part	What it means	Example
Trigger	The event that starts it. "When this happens..."	Someone fills in the contact form on your website.
Action	What the tool does next. "...then do this." You can have several.	Add their details to the sales sheet. Send a thank-you email. Message you to follow up.
Result	What you get without lifting a finger.	No enquiry is forgotten, and every one gets a reply within minutes.

Which tool? Start with what you already pay for. Email filters, calendar booking pages, invoice reminders in your accounting software and form notifications are all built in. When two separate apps need to talk to each other, a connector tool such as Zapier or Make links them.

Step 4: Five automations to start with

These are common in almost every small business, and they pay off quickly. Tick the ones you want to set up.

Task	Trigger	What happens automatically
1. New enquiries	A website form is filled in	Details go into your sheet or CRM, the person gets a "thanks, we'll be in touch" email, and you get a reminder to follow up.
2. Booking calls	Someone books a time	The call is added to your calendar with the video link, a confirmation goes out, and a reminder is sent the day before.
3. Payment reminders	An invoice passes its due date	A polite reminder goes out after 3 days and again after 7 days, until it is paid.
4. Welcoming new clients	A client pays or signs	A welcome email, a short questionnaire, a shared folder and a new project in your task tool, all at once.
5. Weekly report	Every Monday at 7 am	Numbers from your tools (sales, enquiries, hours) are pulled into one sheet and a summary is emailed to you.

- [ ] 1. New enquiries
- [ ] 2. Booking calls
- [ ] 3. Payment reminders
- [ ] 4. Welcoming new clients
- [ ] 5. Weekly report

Step 5: Build your first automation in 6 steps

1. **Write the steps down.** Do the task by hand once and note every step. If you cannot write it as a simple checklist, it is not ready yet.
2. **Fix the process first.** Remove steps nobody needs and agree one way of doing it.
3. **Choose the trigger and the actions.** Use the worksheet in Step 7.
4. **Test with made-up data.** Use a test name and email, never a real customer, and check every result.
5. **Add an alert if it fails.** Most tools can email you when a step breaks. Switch it on so problems never go unnoticed.
6. **Write it down and review it monthly.** Record what it does, who owns it and which accounts it uses. Check it still works each month.

Step 6: Keep it safe

- [ ] Build automations inside your own business accounts, so you keep them if someone leaves.
- [ ] Add helpers as users. Never share passwords by email or chat.
- [ ] Give each tool only the access it needs.
- [ ] Keep a person checking anything that goes to customers until it has run smoothly for a few weeks.
- [ ] Do not send ID numbers, card details or health information through connector tools.
- [ ] Keep a list of every automation, what it does and who owns it.

Step 7: Plan your first automation

Task to automate

Trigger: when this happens...

Actions: then do this... (list each step)

Tools and accounts needed

Owner

How we will know it works

Test date

Want it done for you?

Bridge Imara Services designs, builds and documents automations inside your own accounts, then hands them over with clear notes. Book a free 30-minute call and bring the task you want gone.

Book a free call: calendar.app.google/WMqLtpyrDJUDHbDF9