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10 Quick Wins: Automate Without Developers

A Practical DIY Guide to Getting Started with Automation

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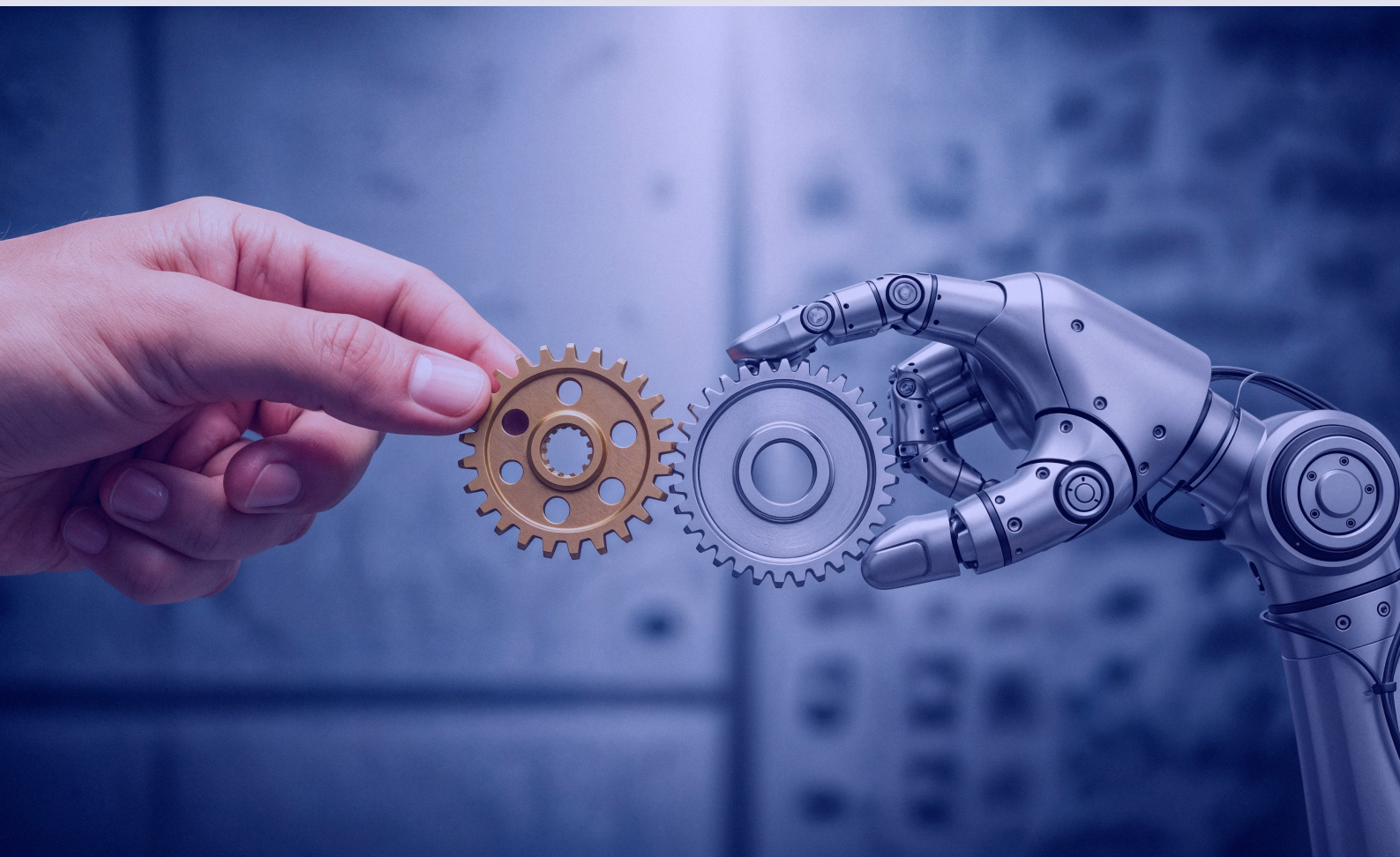


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Introduction

Automation does not always involve developers, high-end systems, and big budgets.

No-code and low-code tools can quickly automate many of the business tasks that people do daily - in some cases, within few hours.

This guide highlights 10 simple automation wins you can implement, even if you don't have a technical background.

What This Guide Is About

This guide is:

- Practical and beginner-friendly
- Focused on quick wins
- Budget friendly and tool-agnostic

This guide is not:

- A replacement for enterprise-grade automation
- Applicable to extremely complicated or controlled processes

2. Form to Spreadsheet Automation

Use Case:

Automatically capture form responses into a spreadsheet or database.

Example:

- Website contact forms
- Internal request forms
- Feedback collection

Tools:

- Google Forms
- Type form
- Airtable
- Zapier

Time to Implement:

- 30 minutes

Cost:

- Free

3. Calendar & Scheduling Automation

Use Case:

Automate meeting scheduling and reminders.

Example:

- Client calls
- Internal reviews
- Interviews

Tools:

- Calendly
- Google Calendar
- Outlook

Time to Implement:

- 20-30 minutes

Cost:

- Free – \$15/month

4. Simple Document Approval Workflows

Use Case:

Route documents for approval without email back-and-forth.

Example:

- Leave requests
- Purchase approvals
- Contract reviews

Tools:

- Google Drive,
- DocuSign,
- Notion

Time to Implement:

- 1-2 hours

Cost:

- Free – \$30/month

5. Automatic File Organization

Use Case:

Automatically organize files into folders based on rules.

Example:

- Invoices by month
- Resumes by role
- Reports by department

Tools:

- Google Drive automation,
- Zapier

Time to Implement:

- 30 minutes

Cost:

- Free

6. CRM or Lead Capture Automation

Use Case:

Automatically add leads to your CRM or tracker.

Example:

- Website inquiries
- Event sign-ups

Tools:

- HubSpot Free,
- Airtable,
- Zapier

Time to Implement:

- 45 minutes

Cost:

- Free

7. Slack or Teams Notifications

Use Case:

Get instant alerts when something important happens.

Example:

- New lead received
- Payment completed
- Form submitted

Tools:

- Slack,
- Microsoft Teams,
- Zapier

Time to Implement:

- 15-20 minutes

Cost:

- Free

8. Simple Chatbots for FAQs

Use Case:

Answer common questions automatically.

Example:

- Office hours
- Pricing FAQs
- Basic support queries

Tools:

- Crisp,
- Intercom basic bots

Time to Implement:

- 1-2 hours

Cost:

- Free – \$30/month

9. Task Creation Automation

Use Case:

Automatically create tasks when events occur.

Example:

- New client onboarding tasks
- Support follow-ups

Tools:

- Trello,
- Asana,
- ClickUp,
- Zapier

Time to Implement:

- 30 minutes

Cost:

- Free

10. Weekly Reports & Alerts

Use Case:

Automatically generate and send reports.

Example:

- Sales summaries
- Lead activity reports

Tools:

- Google Sheets,
- Notion,
- email automation

Time to Implement:

- 1 hour

Cost:

- Free

DIY vs. When to Get Help

Choose wisely for project success

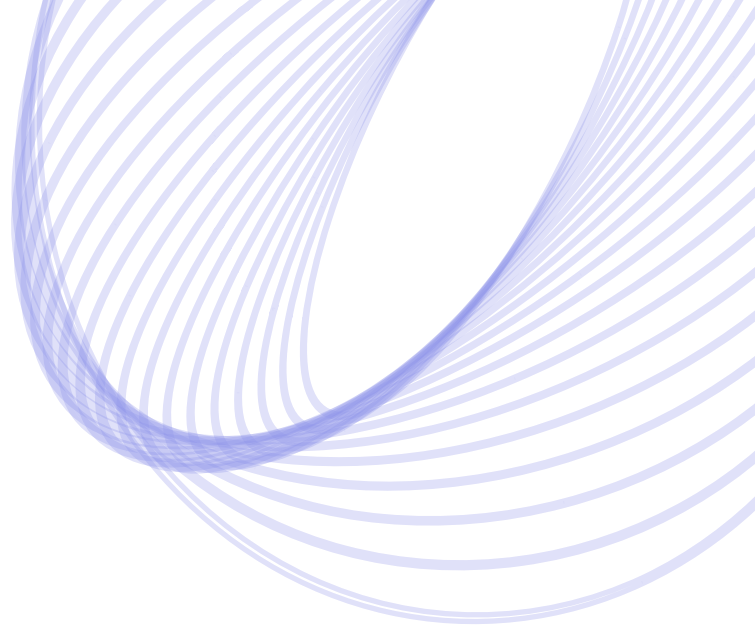


Common Pitfalls to Avoid

- Over-automating broken processes
- Ignoring data quality
- Relying on too many disconnected tools
- No documentation or ownership

The concept of automation does not need to be complex to be useful. These simple wins become a step in the right direction towards the team saving some time instantly and gaining confidence to be able to achieve even more automation in the future.

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About Perimattic

When complexities enhance, Perimattic assists businesses to go beyond the DIY automation into an automated solution that is scalable and AI-powered, which is customized.

If you ever need help with advanced workflows, integrations, or AI-driven automation, reach out at gaurav@perimattic.com

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