CLOCKED OUT CEO

FREE GUIDE

10 AI AUTOMATIONS FOR SMALL BUSINESS

No-code workflows that take busywork off your plate.

clockedoutceo.com

Before you start

You don't need a developer or a big software budget to start automating. Each workflow below is something a solo owner or small team can set up in an afternoon or less. Start with one, run it for a week, then add the next.

Start with one. Pick the automation that fixes your most annoying weekly task. Get it working before you add another.

Drafts, not sends. Let AI write the first draft of anything a customer sees. You review it and hit send.

Check it weekly. Look over what your automations did once a week for the first month. Fix anything that misfired.

Watch your limits. Free plans have caps. On Zapier's free plan you get 100 tasks a month and two-step Zaps only, so multi-step Zaps need a paid plan.

What's inside

01	Sort your inbox automatically	Email	Easy
02	Let AI label what's left	Email	Medium
03	Get first-draft replies to new leads	Email	Medium
04	Let clients book themselves	Scheduling	Easy
05	Take meeting notes for you	Meetings	Easy
06	Send every lead to one place	Sales	Medium
07	Chase unpaid invoices automatically	Money	Easy
08	Organize receipts without the shoebox	Money	Easy
09	Turn one video into a week of posts	Marketing	Easy
10	Get one daily summary	Operations	Medium

Tools, menus and pricing change often. If a button has moved, search the tool's help center for the feature name. Zapier details are from zapier.com/pricing and help.zapier.com, checked November 2026.

AUTOMATION 01 · EMAIL · EASY

Sort your inbox automatically

Newsletters, receipts and notifications skip your inbox and land in labeled folders, so you only see email that needs you.

Tools: Gmail filters (free)

1. In Gmail, click the filter icon in the search bar.
2. In "Has the words", type unsubscribe. Click Create filter.
3. Check Skip the Inbox and Apply the label: Newsletters. Click Create filter.
4. Repeat for receipts (receipt OR invoice OR order) and notifications (from: noreply OR no-reply).

> **Pro tip:** Rules first, AI second. Plain filters are free, instant and never guess wrong.

AUTOMATION 02 · EMAIL · MEDIUM

Let AI label what's left

Every new email gets a label like URGENT, LEAD, CLIENT or FYI, so you can see at a glance what matters.

Tools: Gmail + Zapier (AI by Zapier)

1. Create a Zap with the trigger Gmail: New Email.
2. Add AI by Zapier and ask it to read the email and return exactly one word: URGENT, LEAD, CLIENT or FYI.
3. Add Gmail: Add Label to Email, using the word AI returned.
4. Test it on a few real emails before turning it on.

> **Pro tip:** This Zap has three steps, so it needs a paid Zapier plan.

AUTOMATION 03 · EMAIL · MEDIUM

Get first-draft replies to new leads

When a new lead emails you, a reply draft is already waiting in Gmail. You review it, tweak it and send.

Tools: Gmail + Zapier (AI by Zapier)

1. Create a Zap with the trigger Gmail: New Labeled Email, using the LEAD label from automation #2.
2. Add AI by Zapier: write a short, friendly reply in your voice that answers their question and suggests a next step.
3. Add Gmail: Create Draft Reply.
4. Never use a send action here. Drafts only.

> **Pro tip:** Paste two or three of your real emails into the prompt so the drafts sound like you.

AUTOMATION 04 · SCHEDULING · EASY

Let clients book themselves

No more back-and-forth about times. Clients pick an open slot, and the meeting lands on your calendar with reminders.

Tools: Google Calendar appointment schedules or Calendly

1. Set your available hours and meeting length.
2. Add a few intake questions, like what they need help with.
3. Turn on email reminders before the meeting, if your plan includes them.
4. Put your booking link in your email signature and on your website.

> **Pro tip:** Add a buffer between meetings so you're never back-to-back. Some features, like reminders, may need a paid plan.

AUTOMATION 05 · MEETINGS · EASY

Take meeting notes for you

An AI notetaker writes up the summary and action items after every call, so you can stay present in the conversation.

Tools: Zoom AI Companion, Gemini in Google Meet, or Otter

1. Turn on the AI notes feature in the meeting tool you already use.
2. Tell attendees at the start that the call is being summarized.
3. After the call, check the summary and action items.
4. Paste the action items into your follow-up email.

> **Pro tip:** Always tell people when AI is taking notes. Some places require consent to record. Some of these note features need a paid plan.

AUTOMATION 06 · SALES · MEDIUM

Send every lead to one place

Website forms, booking requests and inquiries all land in one sheet or CRM, and you get a ping the moment one arrives.

Tools: Google Forms or your site form + Zapier + Google Sheets (or a CRM)

1. Create a Zap triggered by a new form submission.
2. Add a step that creates a new row in a Google Sheet (or a contact in your CRM).
3. Add a step that sends you a Slack message or text.
4. Add columns for status and next step, and review the sheet weekly.

> **Pro tip:** Use one sheet for every lead source, so nothing hides in a different inbox.

AUTOMATION 07 · MONEY · EASY

Chase unpaid invoices automatically

Polite payment reminders go out on schedule, so you never have to write the awkward "just following up" email.

Tools: Built-in reminders in QuickBooks, Stripe, Square or your invoicing app

1. Open your invoicing app's reminder settings.
2. Set reminders for a few days before the due date, on the due date, and after it's late.
3. Edit the reminder wording so it sounds like you.
4. Turn on online payment so clients can pay right from the email.

> **Pro tip:** Most invoicing apps already include this. Check your settings before buying another tool.

AUTOMATION 08 · MONEY · EASY

Organize receipts without the shoebox

Receipts go straight to your bookkeeping app or a receipts folder, ready for tax time.

Tools: Gmail filter + your accounting app's receipt-forwarding email (for example, QuickBooks)

1. Find your accounting app's receipt-forwarding address, if it has one.
2. In Gmail, create a filter for receipt OR invoice OR order.
3. Set the filter to forward to that address, or to label the email Receipts.
4. For paper receipts, snap a photo in your accounting app's mobile app.

> **Pro tip:** Gmail asks you to confirm a forwarding address before filters can forward to it.

AUTOMATION 09 · MARKETING · EASY

Turn one video into a week of posts

Turn a single video or podcast into captions, social posts and a newsletter, then schedule them all at once.

Tools: ChatGPT, Claude or Gemini + a scheduler like Buffer

1. Copy the transcript from your video (YouTube can show one).
2. Ask the AI for five short posts, one newsletter blurb and three hook ideas, in your voice.
3. Edit them. Cut anything that doesn't sound like you.
4. Schedule them across the week in your scheduler.

> **Pro tip:** Keep a doc of your best posts and paste it into the prompt as examples.

AUTOMATION 10 · OPERATIONS · MEDIUM

Get one daily summary

Instead of checking everything all day, you get one email each morning with what needs your attention.

Tools: Zapier (Digest by Zapier + AI by Zapier) + Gmail

1. Collect the day's URGENT and LEAD emails (from #2) and new leads (from #6) into a Digest by Zapier.
2. Once a day, have AI summarize the digest in five bullets.
3. Email the summary to yourself at a set time, like 8 AM.
4. Check your inbox once, with a plan.

> **Pro tip:** This is the payoff step. It works best once automations #2 and #6 are running.

Want to see these built?

On the Clocked Out CEO YouTube channel, I walk through real AI workflows step by step, starting with the inbox automation from this guide.

Watch: How I Automate My Entire Inbox with AI

Subscribe: youtube.com/@ClockedoutCeo

Questions: clockedoutceo@gmail.com

Sources: Zapier pricing; What's included in Zapier's Free plan.
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