Automation Checklist for Small Businesses

This checklist covers common automations that save time, improve consistency, and reduce missed opportunities. Use it to review and set up automations for review requests, lead intake, appointment reminders, and basic Zapier or GoHighLevel (GHL) flows.

Review Request Automations

- Set up automated review request emails/texts after service completion.
- Include a direct link to your Google Business Profile review page.
- Personalize messages with customer name and service completed.
- Schedule follow-ups (e.g., 3 days later) if no review is left.

Lead Intake Automations

- Connect website forms directly to your CRM or Google Sheets.
- Send an automatic confirmation email or text to new leads.
- Notify your team instantly (via email, SMS, or Slack) when a new lead is submitted.
- Tag or categorize leads by source (website, ads, social, referral).

Appointment Reminders

- Send appointment confirmation emails/texts immediately after booking.
- Automate reminders 24 hours and 1 hour before appointments.
- Include reschedule/cancel options in reminder messages.
- Log attendance/no-shows automatically in CRM.

Zapier / GHL Automations

- Create Zaps/Workflows to sync leads across platforms (e.g., Facebook Ads → CRM).
- Automate invoice creation when a deal is marked 'won' in CRM.
- Trigger thank-you emails after payment received.
- Set up a weekly summary report of leads, calls, or completed jobs.