

Five automations you can set up this afternoon using free tools. No coding required. Each one saves 30 minutes to 2 hours per week.

What You'll Need

- A Google account (Gmail) — or Microsoft 365 account for the Outlook equivalents
- A free [Make.com](#) or [Zapier](#) account (both have free tiers)
- About 20 minutes per automation

Automation 1: Email Sorting & Labelling

Auto-sort incoming emails into folders

Tool: Gmail filters (built-in) | Time to set up: 10 minutes | Time saved: ~30 min/week

The problem: You spend the first 20 minutes of every day sorting emails into mental categories — client, supplier, newsletter, invoice, spam.

The fix:

1. In Gmail, click the search bar filter icon (▼)
2. Set criteria: e.g., From: *@xero.com OR Subject contains: "invoice"
3. Click "Create filter" → choose: Apply label "Invoices", Skip Inbox (optional)
4. Repeat for your top 5 email categories: Clients, Suppliers, Newsletters, Accounts, Internal

Power move: Create a "Reply Today" label and use it as your to-do list. Once replied, remove the label.

Automation 2: Form Submissions to Spreadsheet

Website enquiries automatically logged and notified

Tool: Google Forms + Sheets (free) or Make.com | Time to set up: 15 minutes | Time saved: ~1 hour/week

The problem: Enquiries arrive by email. You manually copy details into a spreadsheet or CRM. Some slip through the cracks.

The fix (Google Forms route):

1. Create a Google Form with fields: Name, Email, Phone, Enquiry Type (dropdown), Message
2. In the Responses tab, click the Sheets icon — this auto-creates a linked spreadsheet
3. Every submission lands in the sheet instantly, timestamped
4. Set up email notifications: Sheets → Tools → Notification rules → "Any changes" → "Email immediately"

Next level: Use Make.com to also send a thank-you email to the enquirer and post a notification to a Slack or Teams channel.

Automation 3: Invoice Payment Reminders

Automatic chaser emails for overdue invoices

Tool: Google Sheets + Make.com (free tier) | Time to set up: 20 minutes | Time saved: ~1–2 hours/week

The problem: You issue invoices but chasing late payments is awkward, time-consuming, and easy to forget.

The fix:

1. Create a Google Sheet with columns: Client, Email, Invoice #, Amount, Date Issued, Due Date, Status
2. In Make.com, create a scenario: "Every morning at 8am, check the sheet"
3. Filter: where Due Date < Today AND Status ≠ "Paid"
4. Action: Send a polite reminder email via Gmail (template below)
5. Optional: flag invoices 30+ days overdue for a phone call instead

Email template: "Hi [Name], just a friendly reminder that invoice [#] for £[amount] was due on [date]. If it's already been paid, please disregard this — otherwise, could you let me know when to expect payment? Thanks, [Your name]"

Automation 4: Social Media Scheduling

Write once, schedule across platforms

Tool: Buffer or Later (free tier) | Time to set up: 15 minutes | Time saved: ~1 hour/week

The problem: Posting to LinkedIn, Facebook, and Instagram separately eats time. Doing it "when you remember" means inconsistent posting.

The fix:

1. Sign up at **buffer.com** (free: 3 channels, 10 scheduled posts per channel)
2. Connect your LinkedIn, Facebook page, and Instagram business account
3. Spend 30 minutes on Monday writing 3–5 posts for the week
4. Schedule them across the week — Buffer handles the posting at the best times
5. Check analytics monthly to see what topics get engagement

Content ideas for SMEs: Behind-the-scenes photos, client wins (with permission), tips from your expertise, staff spotlights, industry news commentary. The 80/20 rule: 80% value, 20% promotion.

Automation 5: Backup Alerts

Get notified if your backups stop working

Tool: Google Drive / OneDrive + Make.com or IFTTT | Time to set up: 15 minutes | Time saved: prevents disaster

The problem: You set up backups once and assume they're running. Months later you discover they silently failed three weeks ago.

The fix:

1. Identify your backup location (Google Drive folder, OneDrive, NAS, cloud backup)
2. In Make.com, create a weekly scenario that checks the backup folder
3. Condition: if the most recent file is older than 7 days → send you an alert email
4. Subject line: "⚠️ BACKUP CHECK: No new backup in 7+ days — investigate"

Simpler alternative: Set a recurring calendar reminder every Monday morning: "Check backup ran over the weekend." Low-tech but effective.

The 3-2-1 rule: 3 copies of your data, on 2 different types of storage, with 1 stored offsite (cloud counts). If you're not there yet, this week is a good week to fix that.

What's Next?

These five automations are the starting point. Once you're comfortable, consider:

- **CRM automation:** New lead → welcome email → task created → follow-up scheduled
- **Reporting:** Weekly KPI summaries auto-generated from your data and emailed to you
- **Document generation:** Fill in a form → get a branded PDF proposal or contract
- **AI-powered workflows:** Incoming email → AI categorises it → routes to the right person

Need help building something more complex?

SME Intelligence builds custom AI workflows and automations for small businesses. Get in touch at info@smeintelligence.co.uk for a free initial chat about what's possible for your business.