

7 automations your business needs

Seven jobs you do by hand every week, and how to hand each one to a machine.

Follow one client from the first booking to the case study, then build the first one today in about 20 minutes.

WHAT AN AUTOMATION IS

An automation is a job that starts on its own when something happens. Someone books a call, a client pays, a project ends. It then runs the same steps every time, without you.

The old kind could only copy and paste: move a form answer into a spreadsheet, send the same email to everyone. The seven below have **AI in the middle**. It reads, decides and writes: it researches the person who booked, spots a request that wasn't in the deal, writes the proposal. You only check its work and press send.

THE 7 AT A GLANCE

	AUTOMATION	IT STARTS WHEN	HRS / WEEK
01	Pre-call brief	Someone books a call with you	1.5
02	Call → proposal	A sales call ends	3
03	Onboarding	A new client pays	1.5
04	Scope-creep watcher	A client sends a message	1
05	Payment chaser	An invoice goes past its due date	1
06	Content engine	You record one video	3
07	Testimonial → case study	A project is finished	1
	Together		≈ 12

EXAMPLE: hours for a solo business with about four new clients a month. Yours will differ.

WHAT IT REPLACES

Being your own assistant

Most of these jobs aren't hard. They are small, they repeat, and they slip when you are busy. That is when the proposal goes out three days late, the invoice is never chased and the happy client is never asked for a review. Twelve hours a week is about 600 hours a year, or a part-time assistant you don't have to hire.

What each one does

01 Pre-call brief

Before every sales call, a one-page brief on the person you are about to talk to.

STARTS WHEN	Someone books a call. Or every morning, for that day's calls.
WHAT HAPPENS	AI reads their booking answers, website and public profiles. It writes what they sell, where they look stuck, three questions to ask, and which of your offers fits.
TOOLS THAT WORK	Your calendar and booking tool, plus Claude. Built step by step on page 4.
WHY BOTHER	You stop spending the first ten minutes of every call catching up.

02 Call → proposal, already priced

The call turns into a finished proposal draft before you've made a coffee.

STARTS WHEN	Your note-taker finishes the call transcript.
WHAT HAPPENS	AI pulls out the problem, the goal and the budget. It writes the proposal in your format, prices it from your price list and past deals, and saves it as a draft for you to approve.
TOOLS THAT WORK	A call note-taker (Fathom, Fireflies or your video tool's own), a Claude Project holding your past proposals and prices, and Zapier or Make to connect them.
WHY BOTHER	A proposal sent the same day wins more often than one sent three days later, when the lead has gone cold.

03 Onboarding that runs itself

Everything a new client needs, the moment they pay.

STARTS WHEN	A payment comes in (Stripe, PayPal or your invoicing tool).
WHAT HAPPENS	The contract goes out to sign and a client folder is created. A welcome email goes out with next steps. AI writes the kickoff agenda from what the client said on the sales call.
TOOLS THAT WORK	Your payment tool, an e-signature tool, Google Drive or Dropbox, and Zapier or Make to tie them together.
WHY BOTHER	About 45 minutes of copy-paste per client becomes zero, and every client gets the same first impression.

04 Scope-creep watcher

Catches the "could you also quickly..." requests before you do them for free.

STARTS WHEN	A client emails you. Or once a day, across all client email.
WHAT HAPPENS	AI compares each request with what the client signed up for. Anything outside it gets flagged, with a friendly reply ready: "Happy to, that's an extra \$400."
TOOLS THAT WORK	Your email connected to Claude, and a Claude Project with each client's signed scope.
WHY BOTHER	"Just one small thing" is where most solo businesses quietly lose their profit.

05 Payment chaser that reads replies

Polite reminders that get firmer, and that know who has actually paid.

STARTS WHEN	An invoice is past its due date.
WHAT HAPPENS	Reminders go out on day 3, 7 and 14, each a little firmer. If the client replies “paid yesterday”, AI checks your payments first. Only if the money has really arrived does the chasing stop. If it hasn’t, you get a note.
TOOLS THAT WORK	Your invoicing tool’s own reminders (Stripe, QuickBooks, Xero and most others have them), plus Claude connected to email and payments for the checking.
WHY BOTHER	Plain reminders nag people who already paid, and stop too early on people who haven’t.

06 Content engine in your voice

One recorded video becomes a week of posts that sound like you, not like AI.

STARTS WHEN	You drop a new video or voice note into one folder.
WHAT HAPPENS	It is transcribed and cut into short clips. AI writes captions, a newsletter, a LinkedIn post and a carousel script, in your style. Everything lands in one place for you to approve and schedule.
TOOLS THAT WORK	A Claude Project with 10 of your best posts as the style guide, a clip tool, and a scheduler like Buffer or Metricool.
WHY BOTHER	Plain AI posts all sound the same and get scrolled past. Yours get recognised.

07 Testimonial → case study

Your best proof, collected while the client is happiest.

STARTS WHEN	A project is marked done, or the final invoice is paid.
WHAT HAPPENS	A short feedback form goes out. A great answer becomes a case study draft and a post. Then a message goes to the client: “OK to share this?”
TOOLS THAT WORK	A form (Google Forms or Tally), Claude, and Zapier or Make to send it at the right moment.
WHY BOTHER	Without it, your best results stay buried in an email thread, and you forget to ask.

THE ORDER TO BUILD THEM

Easiest first

	BUILD	WHAT YOU NEED	SETUP
1	Pre-call brief	Claude only. Page 4.	20 min
2	Testimonial	A form, Claude, one connection	1 hr
3	Payment chaser	Your invoicing tool’s reminders, then Claude	1 hr
4	Onboarding	Three to four connected tools	2 hrs
5	Call → proposal	A note-taker and your past proposals	2 hrs
6	Content engine	Your best posts and a few tools	3 hrs
7	Scope-creep watcher	Every client’s scope written down	3 hrs

Setup times are rough estimates for a first build.

Automation 01: the pre-call brief

Every weekday morning, Claude looks at the calls in your calendar and writes a brief on each person who booked. There is no coding and no Zapier; it runs inside Claude.

BEFORE YOU START

- **A paid Claude plan** (Pro, Max, Team or Enterprise). Scheduled tasks are not on the free plan.
To check: go to claude.ai, click your name (bottom-left) → **Settings** → **Billing**. If it says Free, upgrade there first.
- **The Claude desktop app** for Mac or Windows, from claude.ai/download. Sign in with the same account. Scheduled tasks live in its **Cowork** tab.
- **Calls that land in your calendar**. If people book you through Calendly or a similar tool, they already do.

1 Ask for their website when they book.

In your booking tool, open the settings for your sales call and add one question to the booking form: **What's your website or Instagram?** Calendly copies the answers into the calendar event, which is where Claude will read them. No answer? Claude can still search their name and company.

2 Connect your calendar to Claude.

Click your name (bottom-left) → **Settings** → **Connectors**. Find **Google Calendar**, click **Connect** and sign in. A Google screen asking for permission is normal. Outlook works the same way.

3 Test it once by hand.

In the **Cowork** tab, start a new task and paste the text below, but change the first words to **Right now**. Replace the part in [brackets] with your own offers and prices. Read the brief it writes. If something is missing, add it to the text.

Every weekday at 7:00, look at today's events in my calendar. For every call booked by someone outside my business, read their booking answers, then look at their website and public social profiles. Write me a one-page brief for each person:

1. What they sell, and to whom
2. Where they look stuck (website, offer, reviews, posting)
3. Three questions I should ask on the call
4. Which of my offers fits best, and why

My offers are: [your offers and prices, one per line]
 Keep each brief short enough to read in two minutes. If there are no calls today, say so in one line.

4 Put it on a schedule.

In Cowork, click **Scheduled** in the left sidebar → **New task** → **Create with Claude**. Paste the text (with "Every weekday at 7:00" back in), answer its questions, check the name and time, and click **Schedule**. It runs even when your computer is asleep. Open the task under **Scheduled** to read each morning's brief.

GOOD TO KNOW

- The brief is research, not fact. Check anything before you quote it to the person on the call.
- It only uses public information. Never paste a client's passwords or private documents into it.
- The more precise your offers and prices are, the better its "which offer fits" answer gets.

THE OTHER SIX

Proposals that price themselves, onboarding that runs itself and a content engine in your voice: the full builds for all six, step by step, are what we set up together inside the PathionAI community. Join the community. The link is on my profile.