
CLEARLINE ADVISORY

5 Workflows You Should Automate This Week

Founders lose 16 hours a week to admin. Here's how to start taking that time back.



A practical guide for founders who are done doing everything manually.

Why These 5 Workflows?

Research shows the average entrepreneur spends 16 hours a week — two full working days — on administrative tasks (Time etc, 2024). These aren't complex AI projects — they're simple, proven workflows that the most operationally efficient businesses have already automated.

This guide gives you five of them, starting with the easiest wins. Each one includes what to automate, which tools to use, and how much time you'll save.

<p>16 Admin hours lost per week*</p>	<p>5 Ready-to-use workflows</p>	<p>1 hr Per workflow to set up</p>
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Pro Tip
Start with Workflow #1 — it takes 15 minutes to set up and saves the most time per effort invested.



Client Inquiry Response

Estimated time saved: 2-3 hours/week

The Problem

A potential client fills out your contact form or sends an email. You see it hours later, scramble to respond, copy-paste a template (if you even have one), forget to follow up three days later, and lose the lead. Sound familiar?

The Automation

- **Instant acknowledgment:** The moment someone inquires, they get a professional, personalized response within 60 seconds — no copy-pasting required.
- **Auto-capture in CRM:** Their details are logged automatically with the right tags and status, so nothing falls through the cracks.
- **Follow-up sequence:** If they don't reply in 3 days, a gentle follow-up goes out. Then another at day 7. All on autopilot.
- **You get notified:** A Slack or email alert tells you a new lead came in, so you can jump in personally when it matters.

3 hrs/week saved

per week on inquiry handling

TOOLS:

Zapier

HubSpot

Calendly

Gmail

■ Quick Win

Even just the instant acknowledgment email alone can double your inquiry-to-call conversion rate.



Meeting Notes & Follow-Ups

Estimated time saved: 3-4 hours/week

The Problem

You leave a meeting, scribble some notes, promise to send a recap... and then your next meeting starts. By end of day, you've had four meetings, sent zero follow-ups, and your notes are scattered across three apps and a napkin.

The Automation

- **AI meeting transcription:** Your meetings are automatically recorded and transcribed with key topics, decisions, and action items extracted.
- **Auto-generated recap:** A clean, formatted summary is created and shared with attendees within minutes of the meeting ending.
- **Action items become tasks:** Every action item is automatically turned into a task in your project management tool, assigned to the right person.
- **Follow-up draft ready:** A follow-up email draft is waiting in your inbox for a quick review and send.

4 hrs/week saved

per week on meeting admin

TOOLS:

Otter.ai

Notion

Asana

Zapier

■ Game Changer

The faster a recap goes out, the more likely action items actually get done. Aim for under an hour.



Client Onboarding Checklist

Estimated time saved: 2-3 hours/week

The Problem

Every new client gets a slightly different experience because the onboarding lives in your head. You forget to send the welcome packet to one client, skip the kickoff call prep for another, and realize halfway through the project that you never collected their brand guidelines.

The Automation

- **Triggered onboarding sequence:** The moment a contract is signed, the entire onboarding workflow kicks off — welcome email, intake form, calendar invites, tool access.
- **Smart checklists:** A project board is automatically created with every onboarding step, assigned owners, and due dates.
- **Client portal setup:** A shared workspace or folder is created and pre-populated with templates, making day one feel polished and professional.
- **Nothing falls through:** If a step isn't completed in 48 hours, you or your team gets a reminder automatically.

3 hrs/week saved

per week on onboarding tasks

TOOLS:

Dubsado

Notion

Google Drive

Slack

■ First Impression

A polished onboarding experience builds trust before you even start delivering. Clients judge professionalism in the first 48 hours.



Weekly Status Reporting

Estimated time saved: 2-4 hours/week

The Problem

Every Friday (or Monday, if we're being honest) you spend an hour pulling numbers from five different tools, formatting them into a report nobody reads, and sending it out feeling like you wasted your morning.

The Automation

- **Auto-pull data:** Your key metrics are pulled automatically from your tools — revenue, pipeline, utilization, client satisfaction — into one dashboard.
- **Report generation:** A clean weekly report is generated and formatted, highlighting what changed, what needs attention, and what's on track.
- **Auto-distribution:** The report is sent to stakeholders on a schedule. No more forgetting or putting it off.
- **Trend tracking:** Week-over-week comparisons are built in, so you spot issues before they become problems.

4 hrs/week saved

per week on reporting

TOOLS:

Google Sheets

Databox

Zapier

Slack

■ The Real Value

Automated reporting doesn't just save time — it gives you data you actually look at, because it shows up without effort.

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Invoice & Payment Reminders

Estimated time saved: 1-3 hours/week

The Problem

You finished the work two weeks ago. The invoice is sitting in your accounting tool. The client hasn't paid. You keep meaning to follow up but it feels awkward, so you wait. Meanwhile, your cash flow suffers and you're resentful.

The Automation

- **Auto-invoice generation:** When a project milestone is marked complete, the invoice is generated and sent to the client automatically.
- **Payment reminders:** Friendly, professional reminders go out at day 7, 14, and 21 past due — no awkward conversations required.
- **Payment tracking:** You see at a glance who's paid, who's overdue, and what's coming in this month. No spreadsheet hunting.
- **Receipt and thank-you:** When payment lands, the client gets an automatic receipt and a thank-you note. Professional from start to finish.

2 hrs/week saved per week on invoicing

TOOLS:

QuickBooks

Stripe

Zapier

FreshBooks

■ Cash Flow Impact

The biggest win here isn't just time — it's removing the emotional friction of chasing payments. Automation makes it professional, not personal.

Your 5-Day Implementation Plan

You don't need a week-long project. Here's how to get all five workflows running in one week, spending about an hour each day.

MON**Client Inquiry Response**

Set up your auto-reply + CRM capture. Fastest win, biggest impact.

TUE**Meeting Notes & Follow-Ups**

Connect your meeting tool to your task manager. Test with one meeting.

WED**Client Onboarding**

Build your onboarding template and connect the trigger. Test end-to-end.

THU**Weekly Reporting**

Connect your data sources to a dashboard. Set up the auto-send.

FRI**Invoice & Payments**

Configure auto-invoicing and reminder sequences. Review and celebrate.

Want Help Setting This Up?

These five workflows are just the starting point. If you want a full operational audit — including a prioritized roadmap of what to automate, systematize, and delegate — that's exactly what the Clearline Advisory Ops Diagnostic is built for.

Book a free 30-minute discovery call
clearlineadvisory.ca