

20 Workflows to Automate First

Ranked by Impact, Difficulty, and Time Saved

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How to Use This Blueprint

Each workflow is ranked by ROI, implementation difficulty, and weekly time savings. Start with the Quick Wins, then move to High Impact. Each includes the recommended tool stack.

Quick Wins (Day 1)

1. Meeting Notes !' Action Items

Tool: Fireflies/Otter !' Notion. Auto-transcribe every meeting, extract action items, assign to team members. Time saved: 3 hrs/week.

2. Email !' CRM Logging

Tool: Zapier + Gmail + HubSpot. Auto-log every sent email to the right contact in your CRM. Time saved: 2 hrs/week.

3. Social Media Scheduling

Tool: Buffer/Hootsuite AI. Batch-create a week of posts in 30 minutes instead of daily posting. Time saved: 4 hrs/week.

4. Invoice !' Bookkeeping

Tool: Zapier + Stripe/QuickBooks. Auto-categorize and log every payment. Time saved: 2 hrs/week.

5. Form Submission !' Slack Notification

Tool: Zapier/Make. Instant team notification when a lead, support ticket, or application comes in. Time saved: 1 hr/week.

Medium Impact (Week 1-2)

1. Lead Enrichment Pipeline

Tool: Clay + Apollo. New lead enters CRM !' auto-enriched with company data, LinkedIn, tech stack, recent news. Time saved: 5 hrs/week.

2. Customer Support Auto-Response

Tool: Intercom Fin / Custom GPT. Answer 50%+ of support tickets automatically using your knowledge base. Time saved: 10 hrs/week.

3. Weekly Report Generation

Tool: ChatGPT + Google Sheets + Zapier. Auto-pull metrics and generate a formatted weekly summary. Time saved: 3 hrs/week.

4. Content Repurposing

Tool: Descript + Opus Clip. One long video !' 10 short clips + blog post + social posts, automatically. Time saved: 6 hrs/week.

5. Proposal/Quote Generation

Tool: ChatGPT + Pandadoc. Standard info auto-filled, custom sections drafted by AI. Time saved: 4 hrs/week.

High Impact (Week 2-4)

1. Sales Outreach Sequences

Tool: Instantly + Clay. Research prospects, personalize emails, send multi-step sequences automatically. Time saved: 8 hrs/week.

2. Competitive Intelligence

Tool: Crayon / custom agent. Monitor competitor websites, pricing, job postings, and news daily. Time saved: 3 hrs/week.

3. Onboarding Automation

Tool: Notion + Zapier + ChatGPT. New hire/client triggers automated onboarding: welcome email, resource sharing, checklist creation. Time saved: 5 hrs/instance.

4. SEO Content Pipeline

Tool: Surfer SEO + ChatGPT + WordPress. Research keywords, generate optimized drafts, schedule publishing. Time saved: 8 hrs/week.

5. Data Entry & Cleanup

Tool: Make + ChatGPT. Parse unstructured data (PDFs, emails) into structured database entries. Time saved: 6 hrs/week.

Strategic (Month 2+)

1. CEO Daily Brief

Tool: Custom agent. Aggregates calendar, email highlights, KPIs, news, and pipeline into a one-page morning summary. Time saved: 1 hr/day.

2. Knowledge Base Construction

Tool: RAG pipeline. Transform company documents, emails, and SOPs into an AI-searchable knowledge system. Time saved: ongoing.

3. IP Monitoring & Enforcement

Tool: Custom agent + web scraping. Monitor for patent infringement, trademark violations, and unauthorized use. Time saved: 10 hrs/week.

4. Customer Churn Prediction

Tool: Akkio + CRM data. Predict which customers are at risk of churning and trigger proactive outreach. Time saved: prevents revenue loss.

5. AI-Powered Hiring Pipeline

Tool: ChatGPT + ATS integration. Screen resumes, generate interview questions, draft offer letters. Time saved: 5 hrs/hire.

About the Author

Justin P. Barrett is an entrepreneur, artist, and author. As CEO of Eyesafe, he built the global standard for display health technology. As founder of Alive LLC, he helps lean teams implement AI systems that actually work — agent architectures, knowledge bases, and automation workflows.

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