

5 Automations That Save Agencies 20hrs/Week

Real implementations from MING Labs that cut manual work by 80%

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1. Client Onboarding Automation

☐ **Saves: 4-6 hours per new client**

The Problem: Every new client requires the same 15-step onboarding process: contracts, project briefs, tool access, team introductions, kickoff scheduling.

Tools Needed:

- Zapier or Make.com (automation platform)
- Airtable or Notion (client database)
- DocuSign (contracts)
- Calendly (scheduling)
- Slack (notifications)

Implementation Steps:

- Trigger: New client record created in CRM
- Auto-generate client folder structure in Google Drive
- Send welcome email sequence (3 emails over 5 days)
- Create DocuSign contract with pre-filled client data
- Add client to project management tool with template tasks
- Schedule automated kickoff meeting invite

- Add client to appropriate Slack channels
- Create billing profile in accounting software
- Notify team members of new client via Slack

2. Proposal Generation & Follow-up

□ **Saves: 3-4 hours per proposal**

The Problem: Proposals require research, customization, pricing calculations, and consistent follow-up that takes hours of manual work.

Tools Needed:

- OpenAI API (content generation)
- Google Docs/Notion (templates)
- Calendly (scheduling)
- Email automation tool

Implementation Steps:

- Client fills brief form (website, industry, services needed)
- AI researches client's industry and competitors
- Auto-populate proposal template with client-specific insights
- Generate pricing based on scope and predefined rules
- Send proposal with automated follow-up sequence:
 - Day 3: Check if they have questions
 - Day 7: Share relevant case study
 - Day 14: Final follow-up with deadline
- Book discovery calls automatically for interested prospects

3. Social Media Content Pipeline

☐ **Saves: 6-8 hours per week**

The Problem: Creating, scheduling, and responding to social media content for multiple clients is a massive time drain.

Tools Needed:

- Buffer or Hootsuite (scheduling)
- OpenAI API (content generation)
- Google Sheets (content calendar)
- Canva API (design automation)
- Zapier/Make (orchestration)

Implementation Steps:

- AI monitors client industry news and trending topics
- Generate content ideas based on client goals and recent trends
- Create posts in each client's brand voice using trained AI models
- Auto-generate visuals using Canva templates
- Schedule content across all platforms with optimal timing
- Monitor mentions and automatically flag urgent responses
- Generate weekly performance reports for clients
- Suggest content improvements based on engagement data

4. Invoice & Payment Processing

☐ **Saves: 2-3 hours per week**

The Problem: Monthly invoicing, payment tracking, and collections require constant manual oversight and follow-up.

Tools Needed:

- QuickBooks or FreshBooks (accounting)
- Stripe (payments)
- Zapier (automation)
- Email automation

Implementation Steps:

- Auto-generate invoices on set dates (monthly/project milestones)
- Include time tracking data automatically from project tools
- Send invoices with automated payment reminders:
 - Day 7: Friendly reminder
 - Day 15: Second notice
 - Day 25: Final notice with late fees
- Process payments and update accounting records automatically
- Send thank you emails with next invoice preview
- Flag overdue accounts for manual intervention
- Generate monthly financial reports for leadership

5. Project Status Reporting

□ **Saves: 4-5 hours per week**

The Problem: Clients want regular updates, but manually creating status reports from multiple tools is time-consuming and often delayed.

Tools Needed:

- Monday.com or Asana (project management)
- Google Analytics (website performance)
- Slack or Microsoft Teams (team updates)
- AI content generator
- Email automation platform

Implementation Steps:

- Automatically collect data from all project management tools
- Pull performance metrics from analytics platforms
- Generate human-readable summaries using AI
- Create visual progress charts and timelines
- Include upcoming milestones and potential risks
- Send weekly reports to clients automatically
- Alert project managers when deadlines are at risk
- Include links for client feedback and approval

□ Implementation Priority

1. **Start with Client Onboarding** - Highest impact, affects every new client
2. **Invoice Automation** - Quick wins, improves cash flow
3. **Proposal Generation** - Scales your sales efforts
4. **Project Reporting** - Improves client satisfaction
5. **Social Media Pipeline** - Frees up creative time

Pro Tip: Implement one automation per month. Rushing leads to mistakes and team resistance.

⚠ Common Implementation Mistakes

- Over-automating before testing manual processes
- Not training team members on automation tools
- Forgetting to build in quality checks and human oversight
- Choosing complex tools when simple ones work fine
- Not measuring time savings to prove ROI

Ready to Implement These Automations?

Get the complete implementation guides, templates, and 1-on-1 setup help with AutomateKit.

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