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DONAHUE WORKS

Less remembering. More getting on with it.

A quick guide to business automation

For business owners and consultants

01 / WHAT IS AUTOMATION?

A repeatable task happens automatically when a specific event occurs, following rules you approve.

Think: "When this happens, do that."

02 / FOLLOW-UP, WITHOUT THE MENTAL CHECKLIST

01
Inquiry arrives
A form captures the lead and their details.

>

02
Reply goes out
An approved message acknowledges interest.

>

03
Follow-up runs
A relevant reminder invites them to book.

>

04
Sequence stops
A reply or booking ends the reminders.*

*Stop rules depend on your tools and must be configured and tested. Your team handles personal conversations.

03 / OTHER TASKS YOU CAN HAND OFF

Client onboarding
Send welcome emails and request intake details.

Appointment reminders
Send confirmations and timely reminders.

Admin updates
Move form details into your customer records.

Team notifications
Alert the right person when a lead needs attention.

START WITH ONE WORKFLOW

Choose a task you repeat often, with clear steps and a clear result. Keep judgment, sensitive decisions, and personal replies with a person.

Want to take follow-up off your list?

Donahue Works builds and tests one lead follow-up sequence in 7 days.
Setups start at $750; complex or customized workflows can exceed $2,500.

A useful first step: write down one task you would love to stop remembering.

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What a workflow looks like

Example: a new inquiry becomes a timely reply, a follow-up, or a human conversation.

1. New inquiry arrives

Capture contact details and the service they asked about.

↓

2. Check the record

Check required details, duplicates, and contact preferences.

→ **Needs attention?**

Missing details or a duplicate: flag for review before sending.

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3. Send the approved first reply

Acknowledge the inquiry and explain the next step.

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4. Wait, then check status

Use an agreed delay. Check again before every follow-up.

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5. Did they reply, book, or opt out?

Your tools need to capture these events reliably.

YES → **Stop reminders**

Reply: notify a person.
Booking: send confirmation.
Opt-out: suppress messages.

NO ↓

6. Send the next approved follow-up

Offer a useful next step, such as a booking link.

↓

7. Finish at the agreed limit

Check status before any further message, then end the sequence.

Build in a safety net

If a connection fails or a message cannot send, alert the workflow owner. Test reply, booking, opt-out, duplicate, and failure paths before launch.

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Start small. Make it useful.

A practical planning sheet, a few good-to-knows, and resources to explore.

YOUR FIRST WORKFLOW: A FIVE-MINUTE BRIEF

Task	What do you repeat or keep putting off?
Trigger	What event should start it?
Action	What should happen, and in which tools?
Stop + owner	When should it stop, and who handles exceptions?
Success	What will you measure: time saved, replies, or bookings?

GOOD TO KNOW BEFORE YOU BUILD

Automation needs a process.
Clear steps come first. It will not create demand or guarantee sales.

Simple workflows do not always need AI.
Rules can handle routine tasks; people handle context and judgment.

Setup is only part of the cost.
Ask about software subscriptions, sending fees, usage limits, and maintenance.

Messages should stay relevant.
Use appropriate contact permissions, honor opt-outs, and stop after replies.

Someone still owns the system.
Connections, tools, and offers change. Agree who monitors and updates it.

USEFUL RESOURCES / CLICK TO EXPLORE

Zapier app directory	Check whether your tools have available connections.
Make Help Center	Explore how automation scenarios work.
n8n documentation	Explore workflows, concepts, and integrations.

Official resources checked October 31, 2026. Tool choice depends on your needs.