



PDX AI Systems

FREE GUIDE

Quick-Win AI Automations

Step-by-step automations you can ship this week — no engineers required.

- Six real automations, each broken into copy-paste steps
- Built for busy owners and ops teams — zero code
- A 15-minute 'where to start' diagnostic at the end

SECTION

How to use this guide

This is not a theory book. Every automation below is something a small or mid-size business can start using within days, using tools you may already pay for. We have deliberately left out the hype and focused on the handful of workflows that save the most time and money.

Each automation follows the same shape: what it is, who it's for, the tools you'll use, the step-by-step setup, a realistic time estimate, and how to know if it's working. Work top to bottom — the first two are the fastest wins.

The 80/20 rule

You do not need to do all six. Pick the one that matches your most painful, most repeated task. A single well-chosen automation will beat five half-finished ones.

SECTION

Automation 1: Draft replies with AI

Inbox overload is the most common time sink we see. The goal here is not to let AI write every email — it's to cut the blank-page problem so your team spends time reviewing and sending, not typing from scratch.

Who this is for

Anyone handling 30+ emails a day: sales, support, client services, or an owner who still answers every message personally.

Tools you'll use

- Any AI assistant (ChatGPT, Claude, or Gemini) — a free tier is enough to start
- Your existing email account (Gmail, Outlook, etc.)

Setup, step by step

- Collect 10–20 examples of the emails you send most (quotes, follow-ups, replies to common questions).
- Paste them into your AI tool and ask it to write a short 'style guide' for how you sound: tone, length, sign-off.
- Save that style guide. This is your reusable prompt — keep it in a note or document.
- For each new email, paste the incoming message plus your style guide and ask for a draft reply.
- Edit the draft in 30–60 seconds, then send from your normal inbox.

Time estimate

About 30 minutes to set up your style guide. Then roughly 1–2 minutes per email instead of 5–10.

How you'll know it's working

Track how long a typical reply takes for one week, then again the following week. Most teams see reply time drop by half within days.

SECTION

Automation 2: Summarize meetings into action items

Meetings create decisions and to-dos that live in people's heads. This automation turns a voice recording or transcript into a clean list of who does what, by when.

Who this is for

Teams that hold regular client calls, standups, or planning meetings and lose follow-ups.

Tools you'll use

- A recorder with transcription (your phone, Otter.ai, Fireflies, or your video-call tool's built-in notes)
- Any AI assistant to clean up the transcript

Setup, step by step

- Record the meeting (with everyone's consent) or export the transcript from your call tool.
- Paste the transcript into your AI tool.
- Ask it for: a 3-line summary, a list of decisions made, and a table of action items with owner + due date.
- Copy that table into your task tool (Todoist, Asana, Trello) or send it in the follow-up note.

Time estimate

Under 5 minutes per meeting once you have a go-to prompt.

Pro tip

Build one reusable prompt: 'From this transcript, give me (1) a 3-line summary, (2) decisions made, (3) action items as a table with owner and due date.' Save it once, reuse it forever.

SECTION

Automation 3: Turn one idea into a content week

If you post on LinkedIn, Instagram, or a blog, consistency beats volume. This automation takes a single topic and stretches it into a week of posts so you're never staring at a blank page.

Who this is for

Owners and marketers who know they should post more but run out of ideas.

Tools you'll use

- Any AI assistant
- A calendar or notes app to batch your posts

Setup, step by step

- Pick one topic you want to own (e.g., 'quoting faster for small contractors').
- Ask the AI for 7 angles on that topic — a question, a myth to bust, a short story, a tip, etc.
- For each angle, ask for a post in your voice plus one hook and one call-to-action.
- Schedule them across the week in your posting tool.

Time estimate

One sitting of about 45 minutes produces a full week (or more) of content.

SECTION

Automation 4: Auto-organize and tag your inbox

A tidy inbox is a quiet mind. This automation sorts incoming mail into folders or labels the moment it arrives, so nothing important buries itself.

Who this is for

Anyone whose inbox has more tabs than they have time to check them.

Tools you'll use

- Gmail (built-in filters + labels) or Outlook (rules)
- AI only if you want it to suggest the rules for you

Setup, step by step

- List the senders and keywords that matter (invoices, clients, 'renewal', 'quote').
- Create a label or folder for each category.
- Build one rule per category: if from X or contains Y, apply label Z.
- Optional: ask an AI to review a week of your mail and suggest the rules you're missing.

Time estimate

About 20–30 minutes for the first pass. It then runs on autopilot.

SECTION

Automation 5: Generate and send follow-ups automatically

Most revenue is won in the follow-up, not the first message. This automation makes sure a lead or client always hears back from you — without you remembering to do it.

Who this is for

Sales teams and service businesses where a slow reply quietly kills deals.

Tools you'll use

- Your CRM or email tool (HubSpot, Pipedrive, or even Gmail + a scheduler)
- An AI assistant to write the follow-up copy

Setup, step by step

- Decide your follow-up cadence (e.g., day 1, day 3, day 7).
- Write one template per touch with the help of AI — keep it short and human.
- Set an automation or reminder that fires each touch if there's no reply yet.
- Add a gentle stop condition so you don't email someone who already said yes.

Time estimate

One hour to build the templates and rules. After that it runs itself.

Why this pays for itself

A consistent three-touch follow-up routinely lifts reply rates well above a single message. For most service businesses, one extra closed job covers the cost of the tools many times over.

SECTION

Automation 6: Build a simple AI assistant for your FAQs

The same five questions come up again and again — hours, pricing, location, availability. This automation gives you a private 'mini-FAQ bot' that answers them from your own documents.

Who this is for

Businesses that repeat the same answers to customers or new hires.

Tools you'll use

- A chat tool with a 'custom instructions' or 'project/knowledge' feature (ChatGPT Projects, Claude Projects, or Gemini)
- Your existing docs: FAQ page, pricing sheet, onboarding notes

Setup, step by step

- Gather the documents that hold your answers.
- Create a new project/space in your AI tool and upload those documents.
- Add a short instruction: 'Answer only from these documents. If the answer isn't there, say so.'
- Test it with 10 real questions your team actually gets, and fix any gaps in the docs.

Time estimate

About an hour to set up; minutes to update when your answers change.

SECTION

Where to start: a 15-minute diagnostic

Not sure which automation to pick first? Answer these five questions. Your top answer is your starting point.

- Which task do you repeat most every week? (That's your Automation 1 or 2.)
- Where does money leak from slow replies? (Automation 5.)
- Do you post but run out of ideas? (Automation 3.)
- Is your inbox a mess? (Automation 4.)
- Do you re-answer the same questions constantly? (Automation 6.)

The one-week plan

Week 1: pick ONE automation and run it daily. Measure the time saved. Week 2: add a second. Resist the urge to do all six at once — momentum beats coverage.

SECTION

Ready to go further?

These six automations are the entry point, not the ceiling. The real value comes when AI is wired into how your business actually runs — quoting, onboarding, support, reporting — with a clear plan and someone to build it alongside you.

If you'd like a roadmap tailored to your business, we do free 20-minute consultations. No pitch, just a clear sense of where AI can help most — and whether it's worth it at all.

Work with PDX AI Systems

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Proudly built in Portland, Oregon.