

# AI Automation Setup Guide

How to Automate Your First 5 Business Workflows in a Weekend

From Whoff Agents · [whoffagents.com](https://whoffagents.com)

<b>WEEKEND</b>	<b>5-10</b>	<b>&lt;\$5</b>	<b>ZERO CODE</b>
5 automations	Hours saved/week	Monthly API cost	Tech skill needed

#	Automation	Time Saved
1	Email Triage and Auto-Labeling	45-60 min/day
2	Lead Capture + Instant Follow-Up	Never drop a lead
3	Weekly Social Content Batch	2-3 hrs/week
4	Customer FAQ Auto-Responder	1-2 hrs/day
5	Weekly Business Review Digest	1-2 hrs/week

## Who This Guide Is For

You're a small business owner, freelancer, or solo operator. You've heard AI can save you hours every week. You've maybe tried ChatGPT a few times. But you haven't actually *automated* anything — it's still manual, still you typing the same things over and over. This guide changes that.

By the end, you'll have five real automations running in your business. Not demos. Actual systems.

### What you need:

- A free Make.com account (we'll use the free tier — no credit card)
- A free Zapier account (optional — same concepts apply)
- An OpenAI or Anthropic Claude API key (under \$5/month at your volume)
- 4-6 hours on a weekend

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## PART 1: Foundation — Setting Up Your AI Stack

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### Step 1: Create Your API Key

#### For Claude (Anthropic) — Recommended:

- Go to [console.anthropic.com](https://console.anthropic.com)
- Create a free account
- Navigate to API Keys → Create Key
- Copy your key — store it in a password manager, never share it
- Add \$10 credit to start (will last months at small business volume)

#### For OpenAI (GPT-4):

- Go to [platform.openai.com](https://platform.openai.com)
- Create account → API Keys → Create new key
- Add \$10 credit

**Which to use?** Claude is better for writing tasks (emails, content). GPT-4 is better for structured data extraction. This guide uses Claude for writing workflows.

### Step 2: Create Your Make.com Account

- Go to [make.com](https://make.com) and create a free account
- Free tier includes: 1,000 operations/month, 2 active scenarios

- For most small businesses, the \$9/month Starter plan (10,000 ops) is plenty

### Step 3: Create Your AI Brand Voice System Prompt

Before building automations, write a system prompt that defines your brand voice. Every AI call will use this. Here is the template:

```
You are a helpful assistant for [BUSINESS NAME], a [TYPE OF BUSINESS]
that helps [TARGET CUSTOMER] with [WHAT YOU DO].
```

```
Brand voice: [describe in 2-3 sentences]
```

```
Always:
```

- Write in first person ("I" and "we")
- Keep responses under [150/300/500] words unless asked otherwise
- End emails with [YOUR SIGN-OFF]
- Never make promises about [ANYTHING YOU CANNOT GUARANTEE]

```
Business details:
```

- Website: [URL]
- Email: [YOUR EMAIL]
- Main services: [LIST]
- Pricing starts at: [\$AMOUNT]

**Pro tip:** Save this system prompt in a doc. You will paste it into every automation you build.

## PART 2: The Five Automations

### Automation 1: Email Triage and Auto-Labeling

45 min	45-60 min/day
Build time	Time saved

When an email arrives in Gmail, AI reads it, classifies it (urgent/normal/low/spam), and applies a label. You open your inbox to a pre-sorted list.

#### The Build:

**Trigger:** Gmail → Watch Emails (check every 15 minutes)

**Filter:** Only process emails from non-subscribed senders (skip newsletters)

**AI Module:** HTTP → Make an API Request to Claude (see code below)

**Router:** 4 paths based on AI response: URGENT / NORMAL / LOW / SPAM

**Action per path:** Gmail → Add Label (or Move to Spam for SPAM)

```
URL: https://api.anthropic.com/v1/messages
Method: POST
Headers:
x-api-key: YOUR_CLAUDE_API_KEY
anthropic-version: 2023-06-01
content-type: application/json

Body:
{
  "model": "claude-3-haiku-20240307",
  "max_tokens": 100,
  "system": "You are an email classifier. Respond with ONLY one word: URGENT, NORMAL, LOW, or SPAM.",
  "messages": [{"role": "user", "content": "Classify this email:\n\nFrom: {{sender}}\nSubject: {{subject}}\nBody: {{snippet}}"}]
```

**Pro tip:** Use claude-3-haiku for classification — it's 20x cheaper than Sonnet and classification doesn't need a powerful model. Cost: ~\$0.002 per 100 emails.

## Automation 2: Lead Capture + Instant Follow-Up

<b>60 min</b>	<b>Never drop a lead</b>
Build time	Time saved

When someone fills out your contact form, AI drafts a personalized follow-up email, adds them to your CRM (Notion, Airtable, or Google Sheets), and sends the email within 5 minutes.

### The Build:

**Trigger:** Typeform/Google Forms → Watch Responses

**AI Draft:** HTTP → Claude API (claude-3-5-sonnet for quality writing)

**Add to CRM:** Airtable → Create Record (Name, Email, Message, Status = New Lead)

**Send Email:** Gmail → Send Email with AI draft as body

**Notify Yourself:** Slack/SMS → New lead alert

```
"system": "[YOUR BRAND VOICE SYSTEM PROMPT]",
"messages": [{
  "role": "user",
  "content": "Write a warm follow-up email to this new lead.\nName: {{name}}. They said:
  {{message}}.\nThey are interested in: {{service_interest}}.\nGoal: confirm receipt, set
  expectations for response time (24 hours),\nask one clarifying question. Max 150
  words."
}]
```

**Pro tip:** Review the first 10 AI-drafted emails before enabling auto-send. Tune your system prompt based on what you see.

## Automation 3: Weekly Social Content Batch

<b>30 min</b>	<b>2-3 hrs/week</b>
Build time	Time saved

Every Monday morning at 8am, AI generates 5 LinkedIn post drafts based on your content pillars. They land in a Google Sheet. You review, pick the best 3, and post throughout the week.

### Content Pillar Sheet Setup (create once):

- Client wins | Story about how a client automated their invoicing | Storytelling

- AI tips | One practical AI tip for [your industry] | Educational
- Behind the scenes | What I worked on this week | Personal
- Social proof | Client result without naming names | Authority
- Hot take | Contrarian opinion on a common belief | Engagement

**Pro tip:** After setup: 15 minutes every Monday to pick and lightly edit your 3 posts for the week. That's it.

## Automation 4: Customer FAQ Auto-Responder

<b>90 min</b>	<b>1-2 hrs/day</b>
Build time	Time saved

When a customer emails you a question, AI checks if it matches one of your common questions. If yes, it drafts a response. If no, it flags for your personal reply.

### The Build:

**Trigger:** Gmail → Watch Emails (filter for your support address)

**AI Classification:** Claude with your FAQ knowledge base in the system prompt

**Router:** Check if response contains NEEDS\_HUMAN

**If NEEDS\_HUMAN:** Gmail label + Slack alert

**If answered:** Gmail → Create Draft (review before sending for first 30 days)

**Pro tip:** To build your FAQ knowledge base: export last 90 days of support emails, paste into Claude, ask: 'What are the 15 most common questions? Write the ideal response for each in my brand voice.'

## Automation 5: Weekly Business Review Digest

<b>60-90 min</b>	<b>1-2 hrs/week</b>
Build time	Time saved

Every Friday at 4pm, the automation pulls your key metrics from Google Sheets, has AI write a 1-page business review summary, and emails it to you.

### Tracking Sheet Setup (update 2 minutes/week):

- Weekly revenue
- New leads
- Proposals sent
- Tasks completed vs planned
- Notes (anything you want to remember)

```
"system": "You are a business analyst. Be honest, specific, and constructive. Direct tone.",
"messages": [{
  "role": "user",
  "content": "Weekly business review.\n\nWeek ending: {{date}}\nRevenue: {{revenue}}\nNew leads: {{leads}}\nProposals sent: {{proposals}}\nTasks: {{done}} of {{planned}}\nNotes: {{notes}}\n\nInclude: (1) key wins, (2) what fell short, (3) one recommendation for next week,\n(4) one thing to watch. Max 400 words."
}]
```

**Pro tip:** Upgrade path: connect Stripe and your CRM directly — eliminate the manual data entry entirely.

## PART 3: What Comes Next

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You now have five automations. In a week or two, you'll notice email feels manageable, no leads get dropped, content is batched, support load is lighter, and you actually know your numbers.

### Natural Next Steps:

- Connect your actual data sources (Stripe, Calendly, your CRM) instead of manual sheets
- Build a client-facing chatbot that handles intake, scheduling, and basic Q&A
- Create a proposal generation automation — input a client name, output a ready-to-send proposal
- Automate your invoicing — trigger invoice creation from a form or calendar event

### Quick Troubleshooting

#### AI response isn't quite right

Improve your system prompt. Add specific examples of good outputs. Add explicit 'don't do X' rules.

#### Automation runs but emails look wrong

Check your variable mapping. Common issue: body text includes HTML tags — use 'Text' not 'HTML' for Claude input.

#### API errors (401 / 429 / 500)

401: check your API key. 429: rate limit — add a 2-3 second sleep between calls. 500: Claude occasionally down — add retry logic.

#### Make scenario won't activate

Check the scenario is toggled ON (blue, not grey). Free accounts limit active scenarios.

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### Resources

- Make.com docs: [make.com/en/help/tutorials](https://make.com/en/help/tutorials)
- Claude API docs: [docs.anthropic.com](https://docs.anthropic.com)
- Prompt engineering: [docs.anthropic.com/en/docs/build-with-claude/prompt-engineering](https://docs.anthropic.com/en/docs/build-with-claude/prompt-engineering)
- Tally (free forms): [tally.so](https://tally.so)
- Airtable free CRM: [airtable.com](https://airtable.com)

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Want this built for you instead of by you?

Every automation in this guide can be custom-built for your specific business, tools, and workflows.

[whoffagents.com](https://whoffagents.com) · [will@whoffagents.com](mailto:will@whoffagents.com) · **\$497/project**

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Whoff Agents — AI Automation for Small Business