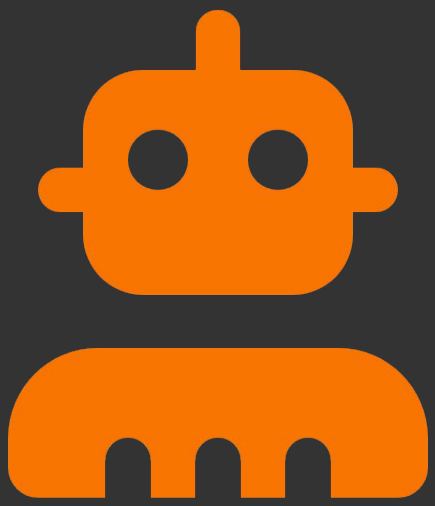


Freelancer Automation Checklist

Save Hours. Stay Sane.

Small systems that run your freelance business on autopilot.

WIL BROWN

Part of The Freelancer's Edge resource series — more at WilBrown.com/resources

Stop Copy-Pasting Your Freelance Life

Introduction

I once spent an entire Sunday night copying client leads from Gravity Forms into a spreadsheet.

By the time I finished, it was Monday. That was my lightbulb moment: I wasn't running a business. I was running a copy-and-paste factory.

These automations are the small wins that gave me my weekends back. You don't need to be technical. You just need to start.

How to Use This Checklist

✅ Pick one automation to set up per week

✅ Use the tools you already know

✅ Start small and let systems grow with you

"Automation isn't about being lazy; it's about being smart enough to never copy-paste the same thing twice."

1/6 Lead Capture & Enquiry Management

Goal: Never miss a new lead again.

✅ Tag new leads automatically in FluentCRM

✅ Send instant confirmation email

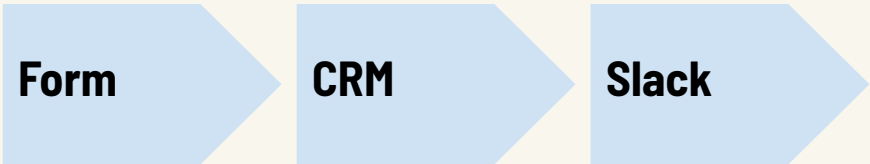
✅ Notify yourself in Slack

Tools:

Gravity/FluentForms + FluentCRM + Zapier

Quick Win:

Zapier “New Form Entry → Slack Message”



✅ Replace FluentCRM with whatever CRM system you use.

2/6 Proposal & Client Onboarding

Goal: Start projects smoothly.

✅ Proposal accepted → trigger onboarding

✅ Create Google Drive folder + ClickUp project

✅ Send client onboarding email with links

Tools:

Zapier + ClickUp + Google Drive

Quick Win:

One zap to create folder and copy your templates

3/6 Proposal & Client Onboarding

Goal: Start projects smoothly.

✅ Proposal accepted → trigger onboarding

✅ Create Google Drive folder + ClickUp project

✅ Send client onboarding email with links

Tools:

Zapier + ClickUp + Google Drive

Quick Win:

One zap to create folder and copy your templates

Proposal → **Zapier** → **GDrive** → **ClickUp** → **Email**

📦 Pro Workflow Highlight

The Smart Start Automation

- ☑️ Client accepts proposal and pays deposit
- ☑️ Zapier creates a Drive folder and ClickUp project
- ☑️ Copies onboarding docs and checklists
- ☑️ Sends onboarding sequence with next steps

4/6 Project Task Management

Goal: Keep projects running themselves.

✅ Auto-assign recurring project steps

✅ Slack reminders for overdue tasks

✅ Daily summary of what's due tomorrow

Tools:

ClickUp (or Notion) + Slack

Quick Win:

ClickUp automation "Every Friday 3pm → Send summary to Slack"

5/6 Client Communication & Updates

Goal: Stay professional without constant typing.

✅ Auto-send weekly project updates

✅ Follow-up reminders for feedback

✅ Tag inactive clients for re-engagement

Tools:

FluentCRM + ClickUp + Zapier

Quick Win:

Use a single ClickUp status change (“Waiting on Client”) to trigger an email reminder.

6/6 Invoicing & Admin Follow-Up

Goal: Get paid faster with less chasing.

✅ Auto-send invoice reminders before due dates

✅ Slack ping when payments land

✅ Trigger feedback form when project closes

Tools:

Xero + Zapier + Slack + Google Sheets

Quick Win:

Auto-log new invoices in a Google Sheet for easy tracking

Quick Wins You Can Do In 30 Minutes

You don't need to rebuild your entire business overnight.

Just automate one tiny pain point at a time.

Each of these quick wins takes under half an hour, but together they'll buyback hours of your week (and a little of your sanity).

Start small, watch the ripple effect, and before you know it, you'll have a business that hums along while you're making your second coffee.

Task	Tool	Time Saved
Auto-tag leads	FluentCRM	15 min
Onboarding email	Zapier + Gmail	10 min
ClickUp daily summary	ClickUp	5 min
Slack new-lead ping	Zapier + Slack	2 min

"Automation isn't magic – it's just future-you saying thanks for being organised."

Automation Added	Tools Used	Time Saved	Next Improvement

About The Author

Wil Brown has been running a successful business since 2005 with clients such as Nikon, Google, Verisk and Queensland Health.

He helps WordPress developers and designers get more clients, increase monthly revenue, and build a sustainable, profitable business.

WilBrown.com

Get The Freelancer’s Edge

Tired of chasing clients and second-guessing your next project?

You’re not alone. Most WordPress freelancers struggle with feast-or-famine work and projects that don’t pay what they’re worth.

That’s why I created **The Freelancer’s Edge,** a short, practical email every fortnight with strategies to:

- Land clients who value your work
- Escape scope creep and low-ball offers
- Grow a business that’s actually sustainable

👉 Get the next issue free at WilBrown.com/newsletter

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