

## 50 Automations for Solo Business Operators

For solo operators running the whole business.

### About this pack

50 short automations for solo operators. Each chapter is also a free individual PDF on Rule The Internet.

Use official tool documentation for anything that touches payments, personal data, or production systems.

### 1. Auto-triage your inbox so only humans need human replies

Label, archive, and escalate mail without living in your inbox.

Solo operators lose mornings to newsletters, receipts, and â quick questionsâ .

Stack: Gmail (or Outlook) + filters + one Zapier/Make path for VIP alerts.

1. Create labels: Clients, Money, Ops, Noise. Star only Clients + Money.
2. Filter newsletters and receipts straight to Noise (archive, never inbox).
3. Route emails from paying domains to Clients with a desktop notification.
4. Once a week, empty Noise without reading â if it mattered, they will follow up.

Tip: Check email in two windows a day. Automation fails if you keep the tab open all day.

Tools: Gmail filters, Google Apps Script, Zapier

### 2. Send invoice reminders without awkward chase emails

Past-due invoices follow up on a schedule you set once.

Chasing payments feels personal when you are the whole company.

Stack: Stripe Invoicing or QuickBooks + automated dunning emails.

1. Turn on Stripe automatic reminders or QuickBooks payment reminders.
2. Standardize due terms (Net 7 / Net 14) so reminders stay consistent.
3. Add a Zap: invoice paid â Slack/email to you + thank-you to client.
4. Escalate only after two soft reminders â then a short human note.

Tip: Polite automation collects more than guilt. Keep the copy short and factual.

Tools: Stripe, QuickBooks, Zapier

### 3. Capture receipts the moment you spend

Photo → folder → bookkeeping queue. Month-end stops being archaeology.

Missing receipts turn tax time into a scavenger hunt.

Stack: Phone camera + Drive folder + bookkeeping tool.

1. Create a Drive folder: Receipts/YYYY-MM.
2. Use your bank or Expensify app to snap every card spend the same day.
3. Zap new receipt files into your bookkeeping inbox or a Notion table.
4. Weekly: 15 minutes to match receipts to transactions → never monthly.

Tip: If you wait until Friday, you will invent stories. Capture in the parking lot.

Tools: Expensify, Google Drive, Zapier

### 4. Catch every lead from forms, DMs, and calendars

One pipeline for website forms, Calendly bookings, and social inquiries.

Leads die in DMs and random inboxes when you are busy shipping.

Stack: Form tool + CRM (even a Notion DB) + Zapier.

1. Pick one CRM truth: HubSpot free, Notion, or Airtable → not three.
2. Every form and Calendly booking creates or updates a contact.
3. Tag source (site, LinkedIn, referral) automatically.
4. Daily digest of new leads at 8am → no live ping spam.

Tip: Speed-to-lead still wins. Autoreply in under 2 minutes; human reply same day.

Tools: Typeform, HubSpot free, Zapier

### 5. Follow up with prospects on autopilot

A 5-touch sequence that stops when they reply.

Solo founders remember to follow up once â then ghost their own pipeline.

Stack: Light sequencer or CRM tasks with templates.

1. Write a 5-email sequence: value, proof, offer, soft bump, break-up.
2. Stop-on-reply is mandatory â never nag someone who answered.
3. Limit to people who opted in or had a real conversation.
4. Review reply rate weekly; rewrite the weakest email.

Tip: Personal first line beats fancy tools. Merge fields are not personalization.

Tools: Lemlist, Gmail, HubSpot

## 6. Assemble proposals from a living template library

Swap variables, export PDF, send â without rewriting scope every time.

Custom proposals eat evenings when every clause is rewritten from scratch.

Stack: Template in Docs/PandaDoc + snippet library in Notion.

1. Build one master proposal: problem, approach, timeline, price, terms.
2. Store reusable scope blocks (audit, build, retain) in Notion.
3. Fill client name, dates, and price with merge fields.
4. Save every sent PDF to Clients/{name}/proposals/.

Tip: Price tables change more than prose. Keep pricing in one editable block.

Tools: Notion, PandaDoc, Google Docs

## 7. Get contracts signed without PDF ping-pong

Send, remind, file â signed agreements land in Drive automatically.

Unsigned contracts stall cash and work while you chase attachments.

Stack: E-sign tool + Drive archive + paid trigger.

1. Upload your MSA and SOW templates to Dropbox Sign / DocuSign.
2. Enable automatic reminders at day 2 and day 5.
3. On complete: save PDF to Drive and notify you.

4. Optional: signed contract â create Stripe customer / project folder.

Tip: Never start unpaid work on a verbal yes. The flow should make signing easier than delaying.

Tools: HelloSign, DocuSign, Stripe

## 8. Client onboarding that runs itself

Kickoff form â shared workspace â welcome sequence.

Every new client asks the same questions you already answered last month.

Stack: Intake form + Notion client page + email sequence.

1. Build an intake form: goals, access list, brand assets, deadlines.
2. On submit: clone a client Notion template and fill fields.
3. Auto-send welcome email with portal link and first milestone.
4. Internal checklist: access granted, invoice sent, kickoff booked.

Tip: If onboarding needs you for every click, it is not a system yet.

Tools: Notion, Fillout, Zapier

## 9. Kill the scheduling email thread

One booking link, buffers, and CRM notes when meetings book.

Back-and-forth on times is unpaid project management.

Stack: Calendly (or Cal.com) + calendar + CRM note.

1. Create event types: Intro 20m, Working 45m, Support 15m.
2. Add buffers and daily caps so you do not overbook.
3. Zap booking â CRM contact + agenda doc.
4. Put the link in your email signature and proposal CTA.

Tip: Offer fewer slots that match deep-work hours. Protect mornings for shipping.

Tools: Calendly, Google Calendar, Zapier

## 10. Turn calls into notes and tasks automatically

Transcript â summary â action items in your task list.

You leave calls inspired and forget the commitments by lunch.

Stack: Recorder/transcription + Notion/ToDoist.

1. Record with consent using Fireflies, Fathom, or native Meet tools.
2. Push summary + action items into the client Notion page.
3. Create tasks only for items with owners and dates.
4. Email a 5-bullet recap within an hour â builds trust.

Tip: Automation drafts; you still approve anything client-facing.

Tools: Fireflies, Notion, Zapier

## 11. Batch social posts once, publish all week

One content block becomes a week of posts without daily context-switching.

Daily posting from scratch destroys deep work.

Stack: Scheduler + asset folder + weekly batch ritual.

1. Pick 3 pillars (teach, proof, product) and rotate.
2. Batch write 7 posts every Monday in Buffer/Typefully.
3. Reuse Canva brand kit â no new layouts mid-week.
4. Queue, then mute social apps until the engagement window you choose.

Tip: Consistency beats virality for a solo brand. Protect the batch ritual.

Tools: Buffer, Typefully, Canva

## 12. Repurpose one long asset into a week of distribution

Podcast or blog â clips, threads, email â same idea, many surfaces.

Creating net-new content for every channel is how solos burn out.

Stack: Source asset + AI draft + human edit + scheduler.

1. Choose one source weekly: blog, Loom, or podcast.
2. Extract 5 quotes, 1 thread, 1 email, 3 shorts.

3. Edit for your voice â never publish raw AI.

4. Schedule across channels; link everything back to one CTA.

Tip: One idea, many doors. The CTA should be identical everywhere.

Tools: Descript, ChatGPT, Buffer

### 13. Welcome new subscribers with a drip, not a blank stare

Day 0â 14 sequence that teaches, proves, and offers.

New subscribers get nothing until your next weekly send â then forget you.

Stack: ESP with automations (Beehiiv/ConvertKit/Mailchimp).

1. Write a 5-email welcome: who you are, best hit, method, case, soft offer.

2. Tag subscribers by lead magnet so later segments stay clean.

3. Pause drip if they buy â move them to customer sequence.

4. Review open rates monthly; rewrite the weakest subject line.

Tip: Your best existing post is email #2. Do not invent filler.

Tools: Beehiiv, ConvertKit, Zapier

### 14. Generate SEO briefs without living in spreadsheets

Keyword â outline â draft checklist in one Notion database.

SEO dies when research never becomes a publishable brief.

Stack: Keyword tool + Notion content DB.

1. Keep a Notion DB: keyword, intent, outline, status, URL.

2. Import top queries weekly from Search Console.

3. For each pick: competitor headings + your unique angle.

4. Status pipeline: Idea â Brief â Draft â Live â Refresh.

Tip: Ship fewer, better pages. Automation should reduce tabs, not invent thin content.

Tools: Ahrefs, Surfer, Notion

## 15. Ask for reviews when delivery is done â every time

Project marked done â polite review ask on a delay.

Happy clients forget to review unless you systematize the ask.

Stack: Project status trigger + delayed email + review link.

1. Define â doneâ in your PM tool (status or paid final invoice).
2. Wait 2â 3 days, then send a short thank-you + review link.
3. Offer a private feedback form first for unhappy paths.
4. Log reviews in a social proof Notion page.

Tip: Never pressure. One ask, one reminder. Then stop.

Tools: Zapier, Typeform, Google Business

## 16. Answer repeat support questions with macros

FAQ macros + a public help doc cut response time in half.

Same five questions steal hours every week.

Stack: Shared help center + canned replies.

1. List your top 15 support questions from the last 90 days.
2. Write clear answers in a public Notion/Help Scout docs site.
3. Create Gmail/Help Scout macros that link to those docs.
4. Update macros when a product change breaks an answer.

Tip: Macros start the reply; personalize the first sentence.

Tools: Help Scout, Gmail templates, Notion

## 17. Route support by urgency so fires get airtime first

Billing and outages jump the queue; compliments wait.

FIFO inboxes bury production issues under FYIs.

Stack: Shared inbox rules + severity labels.

1. Define severities: P1 outage, P2 money, P3 how-to, P4 feedback.

2. Auto-tag by keywords (down, refund, invoice, love).

3. P1 pages you; P3 gets a macro + doc link.

4. Weekly review of mis-tagged mail to tune rules.

Tip: If everything is P1, nothing is. Protect the definition.

Tools: Front, Zapier, Linear

## 18. Ship weekly client status without writing from scratch

Pull shipped items + blockers into a Friday template.

Status emails feel like unpaid writing assignments.

Stack: Task DB + Friday template + optional Loom.

1. Track work in one place with Done this week / Next / Blockers.

2. Friday Zap or script dumps those fields into an email draft.

3. Add a 2-minute Loom only when something needs showing.

4. Send by a fixed time so clients stop chasing you.

Tip: Predictable quiet is luxury. Same day, same format, every week.

Tools: Notion, Zapier, Loom

## 19. Backup sites and data on a schedule you forget exists

Code in git, content snapshots offsite, restore tested yearly.

Solo businesses discover backup gaps during disasters.

Stack: Git + host snapshots + offsite object storage.

1. Put every site in git; never edit production by hand.

2. Enable host automatic backups + weekly offsite copy.

3. Store secrets in a password manager, not in the repo.

4. Once a year: restore to staging and time yourself.

Tip: A backup you have never restored is a rumor.

Tools: UpdraftPlus, Backblaze, GitHub

20. Know your site is down before a client tells you  
HTTP checks + SMS/push when latency or 5xx hits.

Clients should not be your monitoring product.

Stack: Uptime monitor + phone push + status page optional.

1. Monitor homepage + checkout/API health endpoints every 5 minutes.
2. Alert to phone for downtime; email is too slow.
3. Mute planned deploys so you do not train yourself to ignore alerts.
4. Keep a one-page runbook: DNS, host, rollback.

Tip: Alert fatigue is real. Only wake up for customer-visible failures.

Tools: UptimeRobot, Better Stack, Pushover

21. Never miss a domain or SSL renewal again  
Calendar + registrar auto-renew + 30-day heads-up.

Expired domains are silent business killers.

Stack: Auto-renew on + calendar reminders + card on file.

1. Turn on auto-renew for every domain and keep a backup card.
2. Spreadsheet or Notion: domain, registrar, expiry.
3. Calendar event 30 days before each expiry.
4. Monitor SSL with your uptime tool or host alerts.

Tip: Lock domains and enable 2FA on the registrar. Hijacks hurt more than expiry.

Tools: Namecheap, Google Calendar, Zapier

22. Rotate shared secrets without a spreadsheet of doom  
Shared vaults, break-glass accounts, and quarterly rotation.

Solo ops still share passwords in chat â until something leaks.

Stack: Password manager business plan + documented owners.

1. Move every business login into 1Password/Bitwarden.

2. Use shared vaults per client or per function â not one mega vault spam.
3. Enable 2FA everywhere; store OTP in the manager.
4. Quarterly: rotate hosting, DNS, and payment passwords.

Tip: Your future contractor should inherit vaults, not DMs.

Tools: 1Password, Bitwarden, Vault

## 23. Auto-sort files into client folders

Invoices, briefs, and assets land in the right tree without dragging.

Desktop piles become lost work and duplicate versions.

Stack: Strict folder taxonomy + rules for inbound files.

1. Standard path: Clients/{name}/{year}/{contracts|invoices|delivery}.
2. Zap email attachments with subject tags into Drive.
3. On Mac, Hazel can file local downloads by name pattern.
4. Refuse to save â final\_v7â â use dates or git.

Tip: Naming conventions are automation. Without them, rules fail.

Tools: Google Drive, Hazel, Zapier

## 24. Track billable time without the timer guilt trip

Calendar blocks + end-of-day reconcile beat obsessive start/stop.

Manual timers get abandoned; then invoices are guesses.

Stack: Toggl/Harvest + calendar reality check.

1. Create projects per client in Toggl or Harvest.
2. Log time in 25â 50 minute blocks, not per keystroke.
3. Evening: match calendar meetings to entries in 5 minutes.
4. Weekly report â invoice line items automatically where possible.

Tip: If you hate timers, estimate from calendar and adjust â still better than fiction.

Tools: Toggl, Harvest, Notion

## 25. A Monday money digest so cash does not surprise you

Revenue, open invoices, and runway in one morning email.

Solos discover cash problems on rent day.

Stack: Accounting export + Sheet + scheduled email.

1. Connect Stripe/bank to QuickBooks or a Sheet dashboard.
2. Metrics: cash in bank, receivables, last 7-day revenue, upcoming bills.
3. Email yourself every Monday 7am.
4. Add one decision line: what to collect or cut this week.

Tip: A digest you ignore is decoration. Read it with coffee â then act once.

Tools: Stripe, QuickBooks, Google Sheets

## 26. Auto-set-aside tax money every time you get paid

Percentage sweep to a tax account â no willpower required.

Spending gross revenue is how tax season becomes a crisis.

Stack: Separate tax account + transfer rule on payout.

1. Open a separate savings/tax account.
2. On each Stripe payout, move 25â 35% (or your rate) to tax.
3. Automate with bank rules or a Zap + Wise.
4. Quarterly: pay estimates from that account only.

Tip: Talk to an accountant for your rate. The automation is the habit enforcer.

Tools: Stripe, Wise, Bank rules

## 27. Catch SaaS creep before it eats margin

Monthly list of recurring charges with kill/keep decisions.

Trials become zombies on the corporate card.

Stack: Bank export + Sheet + calendar reminder.

1. Export last 90 days of card charges monthly.
2. Tag each as Keep / Replace / Kill.
3. Cancel Kill the same day â do not â decide laterâ .
4. Calendar: subscription audit first Monday each month.

Tip: If you cannot name the weekly job a tool does, cancel it.

Tools: Rocket Money, Sheets, Calendar

## 28. Low-stock and SKU alerts for physical or POD products

When inventory dips, you get pinged â not your angry customer.

Stockouts and oversells happen while you are deep in other work.

Stack: Shopify inventory webhooks + Sheet log.

1. Set inventory thresholds per SKU in Shopify.
2. Zap low stock â email/SMS + Sheet row.
3. For POD, monitor base-cost or supplier downtime notices.
4. Weekly: clear false alarms and adjust thresholds.

Tip: Alert on velocity, not only absolute count, for fast movers.

Tools: Shopify, Zapier, Google Sheets

## 29. Recover abandoned carts without sounding spammy

1â 3 gentle emails with proof and an easy checkout link.

Most carts die from distraction, not rejection â if you never follow up.

Stack: ESP ecommerce flows.

1. Enable native Shopify or Klaviyo abandoned cart flow.
2. Email 1 at 1h (helpful), email 2 at 24h (social proof), optional 3 at 48h.
3. Exclude purchasers automatically.
4. Disclose discounts honestly; do not train people to wait for panic codes.

Tip: Fix checkout friction first. Automation cannot save a broken form.

Tools: Shopify, Klaviyo, Mailchimp

### 30. Pull affiliate and partner numbers into one sheet

Weekly partner performance without logging into five portals.

Affiliate dashboards multiply until you stop looking.

Stack: Sheet hub + scheduled imports/Zaps.

1. List every partner program and its export/API path.
2. Nightly or weekly: append clicks, sales, commission.
3. Highlight partners under a minimum ROI.
4. Cut or renegotiate dead partnerships quarterly.

Tip: Track attribution windows. Comparing 7-day to 30-day apples is how you lie to yourself.

Tools: Google Sheets, Zapier, PartnerStack

### 31. Watch competitors without doomscrolling

Page-change and keyword alerts in a weekly digest.

Manual competitor checks become either obsession or neglect.

Stack: Change monitors + RSS + Friday skim.

1. Watch pricing, changelog, and careers pages for 3 rivals.
2. Google Alerts for brand + category keywords.
3. Dump into Feedly or email digest â not Slack firehose.
4. Act only on pricing or positioning shifts that hit your ICP.

Tip: Curiosity is not strategy. Archive most alerts unread after a glance.

Tools: Visualping, Google Alerts, Feedly

### 32. If you freestyle hire help: intake applications cleanly

Form â scored sheet â interview slots without inbox chaos.

Hiring threads explode when you post one role as a solo founder.

Stack: Form + Notion pipeline + scheduling link.

1. Application form with must-have filters up front.
2. Auto-create Notion cards in Applied / Screen / Interview.
3. Reject politely with a template for clear nos.
4. Only humans interview people who pass the filters.

Tip: Write the scorecard before you post the role. Bias loves vague hiring.

Tools: Typeform, Notion, Calendly

### 33. Pay contractors on a rhythm, not a memory

Invoice received → approve → scheduled payout.

Late contractor pay destroys trust faster than late client pay.

Stack: AP checklist + Wise batches + bookkeeping category.

1. Standard invoice email + due date (e.g. Net 7).
2. Zap invoice PDF → Drive + QuickBooks bill.
3. Pay on one day per week in a single Wise batch.
4. Confirm payment with a short email template.

Tip: Same payday every week. Reliability is your brand with freelancers too.

Tools: Wise, PayPal, QuickBooks

### 34. Track licenses, insurance, and cert expirations

90/30/7 day reminders before anything legal lapses.

Insurance and licenses expire quietly while you ship features.

Stack: Notion expiry DB + calendar reminders.

1. Inventory: insurance, business license, app store certs, trademarks.
2. Fields: item, issuer, expiry, renew URL, cost.
3. Auto-create calendar events at 90, 30, and 7 days.
4. Renew from the reminder → do not snooze twice.

Tip: Put renew cost in the DB so cash planning is not a surprise.

Tools: Notion, Google Calendar, Zapier

### 35. Build a personal ops wiki so you stop re-solving problems

Runbooks for deploy, refunds, and onboarding live in one place.

Solo operators re-learn their own business every quarter.

Stack: Notion/Nexarch wiki with templates.

1. Create pages: Deploy, Incident, Refund, Onboarding, Offboarding.
2. After any painful incident, write the runbook the same day.
3. Link runbooks from your phone home screen.
4. Optional: keep business assets organized in [Nexarch](https://nexarchapp.com).

Tip: If it took more than 20 minutes to figure out once, document it.

Tools: Notion, Nexarch, Obsidian

### 36. Capture ideas instantly, process them weekly

Voice/share sheet → idea DB → Friday triage.

Ideas in Notes app graveyards never become experiments.

Stack: One inbox DB + weekly review.

1. Single Idea Inbox (Notion or Todoist).
2. Phone share sheet / shortcut dumps text in under 5 seconds.
3. Friday: Keep / Kill / Schedule → empty the inbox.
4. Scheduled ideas get a one-hour experiment block.

Tip: Capture is free; unfinished ideas are expensive. Kill aggressively.

Tools: Notion, Apple Shortcuts, Todoist

### 37. End-of-day shutdown checklist on rails

A 10-minute ritual that closes loops so tomorrow starts clean.

Open loops follow you into sleep and wreck the next morning.

Stack: Checklist template + calendar block.

1. Fixed 10-minute shutdown block on the calendar.
2. Checklist: clear triage inbox, set top 3 for tomorrow, close tabs, backup.
3. Phone shortcut opens the checklist.
4. No new work after shutdown â only notes to inbox.

Tip: Shutdown is a product feature for your brain. Protect it like a deploy window.

Tools: Notion, Google Calendar, Shortcuts

### 38. Auto-refresh a one-page business dashboard

Traffic, revenue, and pipeline on one screen â no slide theater.

Building decks for yourself is vanity work.

Stack: Sheet data sources + Looker Studio or Notion embeds.

1. Pick 5 numbers max: revenue, expenses, pipeline, traffic, delivery load.
2. Pipe Stripe + analytics into Sheets nightly.
3. Build one Looker Studio page; bookmark it.
4. Review Monday with the finance digest â not hourly.

Tip: If a metric does not change a decision, delete it.

Tools: Google Looker Studio, Sheets, Stripe

### 39. Qualified form submit â draft contract ready to send

When budget and scope match, prefill the agreement.

Hot leads cool while you manually rebuild paperwork.

Stack: Form qualification + e-sign prefills.

1. Form fields map to contract variables (name, company, package).
2. Only â qualifiedâ answers trigger draft creation.
3. You review 2 minutes, then send for signature.

4. Unqualified leads get a nurture sequence instead.

Tip: Never auto-send contracts without a human glance â wrong price ships fast.

Tools: Typeform, PandaDoc, Zapier

#### 40. Fill seats with reminder sequences, not hope

Registration â calendar invite â T-24h / T-1h nudges.

No-shows crush live sessions when reminders are manual.

Stack: Webinar tool + email automation.

1. Registration adds contact + sends calendar file.

2. Reminders at 24h and 1h with join link.

3. No-show follow-up with replay within 2 hours.

4. Tag attendees vs no-shows for sales follow-up.

Tip: The replay email should have one CTA, not five links.

Tools: Zoom, beehiiv, Zapier

#### 41. Collect testimonials with a short guided form

Prompted questions beat â send me a blurb somedayâ .

Vague asks produce silence; good prompts produce quotable lines.

Stack: Form with prompts + permission checkbox + Drive/Notion store.

1. Form asks: problem before, outcome after, favorite moment, permission to use.

2. Trigger after project completion or positive NPS.

3. Store quotes with headshot/name fields.

4. Monthly: place one new quote on site or sales deck.

Tip: Offer to draft from a 10-minute call if writing is hard for them.

Tools: Typeform, Notion, Zapier

#### 42. Handle refunds with a calm, repeatable path

Request â policy check â refund â note â without emotional improvisation.

Ad-hoc refunds create uneven treatment and chargeback risk.

Stack: Written policy + Stripe refund + CRM note.

1. Publish a clear refund policy and link it from checkout.
2. Macro gathers order ID, reason, and desired outcome.
3. If within policy: refund in Stripe and template reply.
4. Log reason codes monthly to fix product issues.

Tip: Speed + fairness > winning the argument. Document exceptions.

Tools: Stripe, Notion, Gmail

#### 43. Keep buyers updated without manual tracking emails

Label created → shipped → out for delivery → delivered.

→ Where is my order? → tickets are usually missing notifications.

Stack: Shopify notifications or AfterShip + ESP.

1. Enable shipping event emails/SMS in Shopify or AfterShip.
2. Include tracking link and expected window.
3. Delay review ask until delivered + 3 days.
4. Route delivery exceptions to support automatically.

Tip: Proactive tracking emails cut tickets more than hiring support.

Tools: Shopify, AfterShip, Klaviyo

#### 44. Editorial calendar that nags you before you slip

Due dates + reminders for posts you already decided to ship.

Content plans die quietly without deadline pressure.

Stack: Notion calendar view + reminders.

1. Plan 4 weeks of titles with due dates.
2. Reminder 48h before due; escalate 4h before.
3. Missed items roll to a → debt → list → pay it before adding new ideas.

4. Celebrate shipped streak weekly to keep momentum.

Tip: Volume caps matter. Three shipped beats ten fantasized.

Tools: Notion, Google Calendar, Slack

#### 45. Deliver lead magnets instantly every time

Opt-in → email with PDF → tag → welcome drip.

Manual delivery delays kill trust at the first touch.

Stack: ESP automation + file host.

1. Host the PDF on your site or Drive with a stable link.
2. Confirmation email delivers within seconds.
3. Tag by magnet name for future segments.
4. Start welcome drip immediately after delivery.

Tip: The magnet should solve one sharp problem. Broad PDFs convert worse.

Tools: Beehiiv, ConvertKit, Gumroad

#### 46. Context-switch across businesses without tab chaos

One workspace per business with links, status, and next actions.

Solo multi-business operators drown in tabs and lost passwords.

Stack: Nexarch or Notion dashboards + browser profiles.

1. Create a home card per business: site, domain, bank, next action.
2. Use [Nexarch](https://nexarchapp.com) or Notion as the switchboard.
3. Separate Chrome profiles for personal vs each brand when needed.
4. Morning: open switchboard first, pick one business, close the rest.

Tip: Context switching is a tax. Batch by business, not by notification.

Tools: Nexarch, Notion, Chrome profiles

#### 47. Watch the APIs your product depends on

Synthetic checks on critical third-party endpoints.

Your UI looks fine while a payment or AI API is failing.

Stack: Cron/synthetic monitor + alert.

1. List critical dependencies: payments, email, AI, auth.
2. Hit a cheap health or signed test path every few minutes.
3. Alert on consecutive failures, not single blips.
4. Runbook: failover, status copy, customer message.

Tip: Dependence without monitoring is hope. Hope is not an SRE strategy.

Tools: Better Stack, Cron, Zapier

## 48. Keep privacy and terms updates tracked

Policy change log + annual review reminder.

Legal pages rot while products and vendors change.

Stack: Versioned markdown/HTML + calendar review.

1. Store privacy/terms in git or a dated Drive folder.
2. Changelog: date, what changed, why.
3. Annual calendar review or when adding a new vendor/processor.
4. Link policies from checkout, signup, and footer consistently.

Tip: When you add analytics or AI vendors, update disclosures the same week.

Tools: Notion, GitHub, Calendar

## 49. Stay warm with key relationships automatically

VIP list with next touch dates and talking-point notes.

Relationship debt accumulates when you only talk when you need something.

Stack: Lightweight CRM + recurring reminders.

1. List 30 people who matter: clients, peers, mentors.
2. Field: last touch, next touch, note.

3. Weekly reminder to nudge 3 people with a useful note â not an ask.

4. Log touches so you do not double-ping.

Tip: Give first. Automation schedules generosity; it should not spam.

Tools: Notion, Google Contacts, Reminders

## 50. Run an automation backlog like a product roadmap

Score pain ^ frequency, ship one automation a week.

Without a backlog, you automate randomly and still feel busy.

Stack: Scored backlog + weekly ship slot.

1. Capture every annoyance in an Automation Backlog DB.

2. Score 1â 5 on pain and frequency; sort by product.

3. Weekly: ship the top item end-to-end (trigger â action â alert).

4. Retire automations that fire wrongly more than they help.

Tip: The goal is fewer decisions, not more Zapier zaps. Kill ruthlessly.

Tools: Notion, Trello, Nexarch