NOIR DIGITAL AGENCY · MUMBAI · SMB & OPS PLAYBOOK

40 Processes Mumbai Businesses Automate

If your team does something by hand every week, it can usually be automated cleanly using the tools you already own (Google Workspace, Sheets, Tally, Zoho, Shopify, CRM, email, and WhatsApp).

Sales & Lead Ops (1–8)

- 1. Web form → CRM → instant reply
- 2. Day 3 & Day 7 quote follow-ups
- 3. Territory/service lead routing
- 4. Calendar booking + reminders
- 5. Missed-call instant callback SMS/msg
- 6. Pre-call prospect brief in Slack/email
- 7. Stale deal 48h founder alert
- 8. Win/loss post-call summary to CRM

Finance & Accounts (9–16)

- 9. Auto invoice creation on deal close
- 10. Day 3 / Day 7 overdue payment nudges
- 11. Payment received → receipt + ledger
- 12. Tally/Zoho → live MIS dashboard
- 13. Monday receivables summary email
- 14. Vendor bill PDF → Sheet extraction
- 15. Team expense approval routing
- 16. Recurring retainer billing alerts

Operations & Fulfilment (17–24)

- 17. Order → stock check → dispatch alert
- 18. Live delivery status customer updates
- 19. Low-inventory reorder notification
- 20. Purchase order approval workflow
- 21. Client onboarding folder + checklist
- 22. Job done → polite feedback check
- 23. Happy customer → Google review link
- 24. Daily shift/branch rollup summary

Reporting, Docs & AI (25–40)

- 25–28. Weekly agency client reports, ad spend alerts, creative approval tracking, handover pack PDFs
- 29–32. PDF PO/invoice OCR to ERP, two-way Sheet/Shopify sync, duplicate cleanup, daily backups
- 33–36. Private AI assistant on company SOPs, catalogue Q&A bot, call-note summaries, ticket triage
- 37–40. Multi-channel inbox digest, HR onboarding docs, AMC renewal reminders, KPI exception alerts

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WhatsApp +91 88988 35186