A quick start guide to automation & AI agents

Do you want to save time, work smarter, and focus on what matters most in your business? If so, this guide is for you.

The main focus is to start small. Stay curious. And remember, you're not alone.

☀ Here's a quick reference to what's what?

→ **Automation**
Rule-based systems that handle repetitive tasks for you.
(e.g., automatically sending a welcome email)

→ **AI Agents**
Digital teammates that manage multi-step processes.
(e.g., scheduling, reminders, and follow-ups)

→ **Agentic AI**
Fully autonomous systems that make decisions and act on your behalf.
(e.g., managing inventory and orders automatically)

☀ Your key tips for success

✅ **Start small, don't try to automate everything at once**

✅ **Keep humans in the loop for important tasks**

✅ **Track your results to see real progress**

✅ **Stay curious and open to experimenting**

✅ **Trust and transparency matter. Choose tools that let you stay in control**

Before diving into new tools, take a moment to evaluate the platforms and tools you're already using. You might already have what you need to start automating.

Ask yourself
- What tools do I already use every day?
- Can they be connected to simplify repetitive tasks?
- Is there an easy way to integrate them for greater efficiency?

★ Top tools/platforms for automation and AI agents

→ **Make.com**
A no-code platform for connecting apps and automating workflows.

→ **Zapier**
Automate tasks between apps with easy-to-set-up workflows.

→ **Notion AI**
A productivity and organization tool with AI-powered assistance for writing, planning, and research.

→ **ChatGPT**
Use it for content generation, customer service, research, and more.

→ **Relevance AI**
An AI platform that helps businesses organize and analyze data quickly, offering tools for automating workflows and extracting insights to improve business decisions.

☀ Quick challenge

Automate one small task in your workflow this week. Whether it's a simple email or scheduling reminder, track the time saved and adjust as needed. Once you've seen the results, consider what the next task could be!

After completing your first automation, share your experience with us on the **Aigility Hub Free SKOOL Community HERE**. Celebrate every step forward, no win is too small.

If you need help or guidance along the way, reach out anytime: **melissa@aigilityhub.com**