

Six CRM automations every small team needs.

Vendor-neutral. Six rules a 1 to 50 person team can turn on this week, and the hours each one buys back.

FOR 1 TO 50 PERSON TEAMS RUNNING 30 TO 80 ACTIVE DEALS.

A 1 to 50 person team does not need 40 automations. It needs the six rules that buy back the hours the operator is still spending on manual admin. Each rule below is a sentence: when X happens, do Y. Read it out loud. If your CRM can run it, turn it on this week. If it cannot, you now know the exact gap to ask about.

RULE	WHEN X HAPPENS, DO Y	HOURS BACK / WEEK
01 Post-meeting follow-up	When a meeting on a deal ends, draft a follow-up email tied to the deal record.	2 to 3
02 Overdue-deal alert	When a deal has not moved stage in 14 days, flag it on a daily digest to the deal owner.	1 to 2
03 Lead routing on form submit	When a website form is submitted, create a lead record and assign the owner by territory or round-robin.	1 to 2
04 Email-to-record capture	When an inbound email arrives from an address that matches a contact, attach the email to that record automatically.	2 to 3
05 24-hour meeting reminder	When a meeting on a deal is 24 hours away, send a reminder to the deal owner with a one-line prep note.	0.5 to 1
06 Weekly status digest	Every Monday at 9 am local time, send the deal owner a digest of deals advanced, deals stalled, meetings this week, and follow-ups owed.	1 to 1.5

TOTAL HOURS BACK / WEEK

7 to 12 hours

Conservative composite for a 1 to 50 person services team running 30 to 80 active deals.

A rule you can read out loud is a rule any CRM can run.

[02] IMPLEMENTATION + RED FLAGS

Turn each rule on, then watch the moment it misfires.

Every automation is one calendar bug, one stale whitelist, or one teammate's PTO away from sending a follow-up to a meeting that did not happen. Ship each rule, then scope it down the first time it fires wrong. The implementation note is how to set it up. The red flag is what breaks first.

[01] POST-MEETING FOLLOW-UP

2 TO 3 H/W

When a meeting on a deal ends, draft a follow-up email tied to the deal record.

[IMPLEMENTATION]

Scope to deal-linked calendar events only. Draft, do not send. The operator reviews, edits one line, then sends. The draft saves the cold-start, not the judgment.

[RED FLAG]

The rule fires before the meeting actually ends (calendar bug, early hangup) and a follow-up gets drafted for a meeting that did not happen. Add a 5-minute buffer or trigger on calendar status closed.

[02] OVERDUE-DEAL ALERT

1 TO 2 H/W

When a deal has not moved stage in 14 days, flag it on a daily digest to the deal owner.

[IMPLEMENTATION]

Daily digest, not real-time pings. One email at 8 am with the list. The 14-day window is the floor for a services team; raise to 21 if your sales cycle is longer than 60 days.

[RED FLAG]

The window is too tight (7 days), the digest becomes noise, the operator stops opening it within a week. If you skip the digest twice in a row, the window is wrong, not the rule.

[03] LEAD ROUTING ON FORM SUBMIT

1 TO 2 H/W

When a website form is submitted, create a lead record and assign the owner by territory or round-robin.

[IMPLEMENTATION]

Round-robin for a flat team, territory for a regionalized one. Write the assignment rule down before you turn the automation on. A rule the team can recite is a rule the team will trust.

[RED FLAG]

The rule routes to a teammate who is on PTO. Add an assign-while-out fallback (skip to the next owner in the rotation) before you ship. Otherwise the first vacation week kills the lead.

[03] IMPLEMENTATION + RED FLAGS (CONT.)

The remaining three rules. Same shape: set it up, then scope down.

[04] EMAIL-TO-RECORD CAPTURE

2 TO 3 H/W

When an inbound email arrives from an address that matches a contact, attach the email to that record automatically.

[IMPLEMENTATION]

Match on the sender domain plus contact email. Attach the email body and headers to the record's activity timeline. The operator stops cc-ing the CRM.

[RED FLAG]

The rule attaches every newsletter, every bounce notification, every out-of-office reply. Add a sender whitelist or a noreply-pattern filter before turning it on. Otherwise the timeline becomes spam.

[05] 24-HOUR MEETING REMINDER

0.5 TO 1 H/W

When a meeting on a deal is 24 hours away, send a reminder to the deal owner with a one-line prep note.

[IMPLEMENTATION]

Scope to deal-linked meetings only, not internal standups. The prep note pulls the last deal-stage update and the last note on the record. One line, no more.

[RED FLAG]

The rule fires for every calendar event including 1:1s and internal syncs. The operator mutes the reminder channel by week two. Filter to events with a linked deal record only.

[06] WEEKLY STATUS DIGEST

1 TO 1.5 H/W

Every Monday at 9 am local time, send the deal owner a digest of deals advanced, deals stalled, meetings this week, follow-ups owed.

[IMPLEMENTATION]

Four sections, one screen. The order matters: advanced (the wins), stalled (where to push), meetings (where to prep), follow-ups (where to chase). Local time per owner, not server time.

[RED FLAG]

The digest grows past one screen. The operator scrolls past the stalled section, then stops opening it. Cap each section at the top five, link the rest.

[NEXT]

Turn on three this week. Add the rest next month.

Every automation will misfire once. That is the moment to add the filter, the whitelist, or the assign-while-out fallback. Then leave it on. The discipline is to ship the rule, watch the first misfire, and scope down once.

STEP 01

Pick the three highest-leverage rules for your team.

Default order for a services team: 01 post-meeting follow-up, 06 weekly status digest, 02 overdue-deal alert. They cover the three moments the operator is still load-bearing.

STEP 02

Write the rule down before you build it.

If you cannot say the sentence out loud in 10 words, the rule is not ready to ship. Name the trigger. Name the action. Name the owner.

STEP 03

Watch the first misfire, then scope down.

Every rule will misfire once. That is the moment to add the filter, the whitelist, or the assign-while-out fallback. Then leave it on.

3 plans, no per-seat surprises, no sales calls.

[Read the cornerstone](#)

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