2026 AI Skills Series

DAY 9

AI Workflow Automation

Stop Being the Bridge Between Your Apps. Let AI Handle the Busywork.

Student eBook & Reference Guide

90-Minute Virtual Classroom | Complete with Workbook & Assignments

How to Use This eBook

Welcome to Day 9. You have now built AI tools that create content, generate images, produce videos, compose audio, and answer questions on your behalf. Today you connect them. AI Workflow Automation is the skill of building systems where apps talk to each other automatically — triggered by events, processed by AI, and delivered as actions — without any manual effort from you.

Every knowledge worker in 2026 spends a significant portion of their week on invisible repetitive work: copying information between apps, reformatting data, sending the same type of email, logging activities into spreadsheets, posting updates to multiple platforms. Automation eliminates this work entirely. Today you learn to identify it and build systems that erase it.

⚡ TRIGGER	🧠 AI BRAIN	✅ ACTION
The event that starts it all	What AI does with the data	Where the result goes

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Chapter 1: The Automation Mindset — Identifying Your Hidden Time Tax

1.1 The Invisible Work

Every professional has two types of work: the high-value work they were hired to do (strategy, relationships, problem-solving, creativity), and the invisible work that consumes their week without creating value (copying data between apps, reformatting documents, sending routine emails, updating spreadsheets, logging activities).

Research by McKinsey Global Institute (2023) found that knowledge workers spend an average of 28% of their working week on email alone — reading, writing, and managing routine communications. A further 14% is spent searching for information across tools. Together, that is more than two full working days per week on tasks that add no strategic value. Automation's promise is simple: reclaim those days.

> ⏱️ **Your Personal Time Tax Audit**
> Before the session begins, count the repetitive tasks you did YESTERDAY that fit this pattern: (1) Something happened in one app. (2) You manually copied or moved information to another app or person. (3) You will do the exact same task again tomorrow. Every task that fits this pattern is a candidate for automation. The average professional identifies 5-8 such tasks in a 5-minute audit.

1.2 What 'Automation' Actually Means in 2026

Automation in 2026 does not mean writing code or hiring a developer. It means connecting apps using visual, no-code tools — so that when Event A happens in one app, the data flows automatically through an AI processing step and arrives as a completed action in another app.

The tools that make this possible — Zapier, Make.com, and Microsoft Power Automate — have been radically transformed by AI in 2025-26. You can now describe a workflow in plain English and the tool builds it for you. The AI step in the middle means workflows no longer just move data — they process, interpret, summarise, translate, and act on it.

1.3 The Four Automation Categories

Category	What It Automates	Real Example
Data Movement	Copying information between apps without transformation	*New row in Google Sheets → automatically create task in Asana with same details*
AI Processing	Moving data AND having AI interpret, reformat, or enrich it	*New customer email → AI extracts key request and sentiment → categorised ticket in CRM*

Communication	Automatically sending or routing messages based on triggers	*Form submission → personalised welcome email → Slack notification to team*
Reporting	Automatically collecting and summarising data on a schedule	*Every Monday 8am → pull last week's sales from CRM → AI summary → email to CEO*

Chapter 2: Your Automation Toolkit

Tool	Best For	Access	Key Differentiator 2026
Zapier	Beginners — widest app library	Free (5 Zaps) — zapier.com	Copilot: type a workflow in plain English and AI builds it. Connects 6,000+ apps. Industry standard.
Make.com	Complex, data-heavy visual flows	Free (1,000 ops/month) — make.com	Visual scenario canvas — see data flowing in real time. Superior for loops, iterators, and high-volume data processing.
Microsoft Power Automate	Microsoft 365 ecosystem	Included with M365 — powerautomate.microsoft.com	Deep native integration with Outlook, Teams, SharePoint, Excel. AI Builder for document processing.
n8n	Self-hosted, developer-friendly	Free (self-host) — n8n.io	Open-source. Data never leaves your server. Ideal for Nigerian enterprises with data sovereignty requirements.
Pabbly Connect	Budget-conscious African SMEs	Paid but affordable — pabblyconnect.com	One-time pricing model (no monthly subscription). Popular in Nigerian startup ecosystem for cost reasons.
Zapier Central	AI agents watching live data	Zapier premium — zapier.com/central	2026 feature: AI agent monitors a spreadsheet or inbox and takes action when it detects a specific pattern. Proactive rather than reactive.

> ⭐ **Today's Session Tools**
>
> Use Zapier for all three drills — its Copilot (natural language builder) is the fastest learning path. Explore Make.com in Chapter 8 for the visual scenario approach. Both have free tiers that support today's complete session. Sign up for Zapier now if you have not already.

Chapter 3: The Trigger-Brain-Action Framework

3.1 Every Workflow Has Three Parts

Every automation — whether called a Zap (Zapier), a Scenario (Make.com), or a Flow (Power Automate) — follows the same fundamental structure. Understanding this structure lets you design any workflow before you touch a tool.

Part	What It Is	Think of It As	Question to Ask
⚡ The Trigger	The event in App A that starts the whole chain	*The 'If' in an If-Then statement*	'What event should START this workflow?'
🧠 The AI Brain	The AI processing step in the middle — interprets, summarises, classifies, or enriches the data	*The employee who reads the information and decides what to do with it*	'What should AI DO with this data before the action?'
✅ The Action	The result delivered to App B — a created task, sent message, updated record	*The 'Then' in the If-Then statement*	'Where should the processed result GO?'

3.2 TBA Examples — From Simple to Sophisticated

Simple — 2-step (no AI brain):

⚡ TRIGGER	🧠 AI BRAIN	✅ ACTION
New subscriber added to Mailchimp list	— (no AI step needed)	Add subscriber as new contact in Google Contacts

Intermediate — 3-step (with AI brain):

⚡ TRIGGER	🧠 AI BRAIN	✅ ACTION
New email arrives in Gmail with subject containing 'Invoice'	Extract: vendor name, invoice number, total amount due, payment deadline	Create new row in Google Sheets invoice tracker with extracted fields

Advanced — Multi-step (AI + conditional):

⚡ TRIGGER	🧠 AI BRAIN	✅ ACTION
New lead form submitted on website	Classify lead as Hot / Warm / Cold based on budget field and	IF Hot → email sales manager immediately + create CRM deal.

	company size. Write a personalised first-contact email draft.	IF Warm/Cold → add to nurture email sequence only.

3.3 The Power of the AI Brain Step

What makes 2026 automation fundamentally different from earlier versions is the AI processing step. In 2020, automation tools could only move data — copy this field, paste it there. Today they can transform data: understand it, summarise it, extract specific information from unstructured text, translate it, classify it, and make decisions based on it.

- Summarisation — a long customer email becomes a 2-sentence brief for the sales team
- Extraction — an invoice PDF becomes structured database fields without manual data entry
- Classification — incoming support tickets are automatically tagged by issue type and priority
- Generation — a new lead's name and company becomes a personalised outreach email draft
- Translation — a customer message in Yoruba or French is translated before logging in the CRM

Chapter 4: Zapier Copilot — Building with Natural Language

4.1 What Copilot Does

Zapier Copilot is a 2025-26 feature that fundamentally changes how workflows are created. Instead of manually selecting apps, configuring triggers, and mapping fields — you describe what you want in plain English, and the AI builds the Zap structure for you.

The workflow is: describe → review the AI-generated map → connect your accounts → test → activate. The design phase — which previously took 20-40 minutes for a beginner — now takes 2-3 minutes.

4.2 Writing a Good Copilot Prompt

Like all AI tools, the quality of Copilot's output depends on the quality of your description. Use this structure:

COPILOT PROMPT STRUCTURE: The Formula

When [EVENT] happens in [APP A],[what the AI should DO with the data — optional but powerful],then [RESULT] in [APP B].

Basic Prompts — Data Movement

BASIC COPILOT PROMPT: **Simple 2-Step Workflow**

"When I receive a new email in Gmail, create a task in Todoist with the email subject as the task name."

AI-Enhanced Prompts — Processing Included

AI COPILOT PROMPT: 3-Step with AI Brain

"When a new message arrives in my Slack #client-updates channel,use AI to summarise the key action item and identify any deadline mentioned,then create a task in Asana with the summary as the description and the deadline as the due date."

AI COPILOT PROMPT: Lead Processing Workflow

"When a new lead submits my Typeform contact form,use AI to write a personalised first-contact email based on their name, company, and enquiry type,then send the draft email to me in Gmail for approval before it goes to the lead."

💡 **The Human Approval Gate**

> Notice the last prompt ends with 'for approval before it goes.' This is the Human Approval Gate — one of the most important automation design principles in 2026. The AI drafts; you approve. In Zapier, add a 'Delay for Approval' step between the AI generation and the send action. You receive a notification on your phone, review the AI draft, and click Approve or Edit. The workflow only completes after your sign-off. This eliminates automation risk while still removing the drafting work from your schedule.

4.3 Connecting Your Accounts

After Copilot builds the workflow map, each app step requires authentication — you log into your Gmail, Slack, Asana, or other apps to grant Zapier permission to access them. This is a one-time process per app:

1. Click the app step in the workflow map.
2. Click 'Sign in to [App Name].'
3. An OAuth authorisation window opens — log in with your account credentials.
4. Click 'Allow' or 'Authorise.'
5. Zapier confirms the connection with a green tick.
6. Repeat for each app in the workflow.

Once connected, the same account authentication is reused for all future Zaps involving that app. You do not re-authenticate for each new workflow.

Chapter 5: The AI Step — What the Brain Actually Does

5.1 The 'AI by Zapier' Step

In a Zapier workflow, the 'AI by Zapier' step (or 'Code by Zapier' with GPT instructions) is the AI processing layer between trigger and action. It takes the data from the trigger, processes it according to your instructions, and passes the result to the action step.

5.2 AI Step Instruction Patterns

The instruction you give the AI step determines what it does with the incoming data. Here are the most useful patterns:

Pattern	When to Use	Instruction Example
Extraction	Data arrives as unstructured text; you need specific fields pulled out	*"Extract the following from the email: (1) Sender company name (2) Invoice number (3) Total amount due (4) Payment due date. Return as JSON."*
Summarisation	Long content needs to be condensed before being sent or logged	*"Summarise this customer email in 2 sentences. Include: the main request and the urgency level (High/Medium/Low)."*
Classification	Incoming items need to be sorted into categories for routing	*"Classify this support ticket into one of these categories: Billing, Technical, Account Access, Feature Request, Complaint. Return only the category name."*
Generation	You need AI to write content based on incoming data	*"Using the customer name, company, and enquiry from the form, write a warm 3-sentence first-contact email. Professional but conversational tone."*
Decision	The workflow should take different paths based on AI analysis	*"Read this lead form submission. Return exactly one word: HOT (budget >₦500k, needs AI urgently), WARM (exploring options), or COLD (research only)."*

> ⚙️ **Structured Output Instruction**
> For AI steps that feed into form fields (like creating a task or updating a spreadsheet row), always ask for structured output. End your instruction with: 'Return your response as JSON with these exact keys: {action_item, deadline, priority, owner}.' This makes the data reliable for the next step and prevents the AI from adding prose that breaks the field mapping.

Chapter 6: Practice Drills

Drill 1 — Slack to Task: Your First AI Automation (15 Minutes)

Build this workflow using Zapier Copilot. No account connections required during the session — you will simulate with test data.

THE WORKFLOW:

⚡ TRIGGER	🧠 AI BRAIN	✅ ACTION
New message saved/starred in Slack #action-items channel	Extract the Action Item and the Deadline. If no deadline is mentioned, set it for Tomorrow at 9:00 AM WAT.	Create new task in Google Tasks (or Todoist) with extracted action as the title and deadline as the due date.

Step-by-Step Build

7. Go to zapier.com → Create → Create with AI (Copilot).
8. Type this prompt into the Copilot bar:

DRILL 1 COPILOT PROMPT:

"When I star a message in Slack, use AI to extract the action item and deadline from the message text. If no deadline is in the message, set it for tomorrow at 9 AM. Then create a task in Google Tasks with the extracted action item as the title and the deadline as the due date."

9. Review the workflow map Copilot generates. Confirm it shows: Slack trigger → AI step → Google Tasks action.
10. Click the AI step. In the 'Prompt' field, review or replace with:

AI STEP INSTRUCTION: Action Item Extractor

Extract from the Slack message text:1. Action Item: the specific task to be done2. Deadline: the date or time when it must be doneIf no deadline is mentioned, set Deadline to 'Tomorrow at 09:00 AM'.Return as JSON: {"action_item": "...", "deadline": "..."}

11. Click 'Test Step' and enter this sample Slack message: 'Please prepare the Q3 client report. Needs to be ready by Friday 5pm.'
12. Verify the AI extracts: action_item = 'Prepare Q3 client report', deadline = 'Friday 5:00 PM'.
13. Map the extracted fields to the Google Tasks creation step.
14. Click 'Publish Zap.'

Drill 2 — Email Intelligence Workflow (12 Minutes)

THE WORKFLOW:

⚡ TRIGGER	🧠 AI BRAIN	✅ ACTION
New email arrives in Gmail with a label 'Client' OR matching filter '[Urgent]' in subject	Summarise the email in 2 sentences. Classify urgency: High / Medium / Low. Identify the sender's main request.	Send a Slack direct message to yourself: '[URGENCY] From: [Sender] — [2-sentence summary]'

DRILL 2 COPILOT PROMPT:

"When a new labelled email arrives in my Gmail inbox, use AI to summarise the email in 2 sentences, identify the sender's main request, and classify urgency as High, Medium, or Low. Then send me a Slack DM with the urgency level, sender name, and 2-sentence summary."

AI Step instruction for this drill:

AI STEP INSTRUCTION: Email Intelligence Brief

Process this email and return JSON:{ "sender_name": "extract from From: field", "urgency": "High (needs response today) / Medium (this week) / Low (no deadline)", "main_request": "one sentence – what does the sender specifically want?", "summary": "2 sentences – what is this email about and what action is needed?"}

Drill 3 — Weekly Report Generator (10 Minutes)

THE WORKFLOW — Scheduled automation (no trigger app needed):

⚡ TRIGGER	🧠 AI BRAIN	✅ ACTION
Every Monday at 7:00 AM WAT (Zapier Schedule trigger)	Read last week's tasks from Google Sheets. Use AI to write a brief weekly accomplishments summary and identify top 3 priorities for this week.	Send the summary as an email to yourself (and optionally your manager) via Gmail.

DRILL 3 COPILOT PROMPT:

"Every Monday morning at 7 AM, get the tasks completed last week from my Google Sheets tracker, use AI to write a 3-paragraph weekly accomplishments summary and identify my top 3 priorities for this week, then email the summary to me."

This drill introduces the Schedule trigger — one of the most powerful patterns in automation. No external event needed; the workflow fires automatically on a timetable, making it perfect for regular reporting, reminders, and digest emails.

Chapter 7: Advanced Automation Patterns

7.1 Multi-Step Workflows

A multi-step Zap chains more than one action after a single trigger. The output of Step 2 can feed into Step 3, and so on. This enables full business process automation from a single event:

- Trigger: New purchase in Paystack → Step 1 AI: Generate personalised thank-you email + next product recommendation → Step 2 Action: Send email via Gmail → Step 3 Action: Add purchase to Google Sheets revenue tracker → Step 4 Action: Post 'New sale: [Product]' to Slack #sales channel
- Trigger: New Google Form submission (client onboarding) → Step 1 AI: Create welcome email + project brief → Step 2 Action: Send welcome email → Step 3 Action: Create Trello board from template → Step 4 Action: Schedule first check-in meeting in Google Calendar

7.2 Conditional Paths (Filters and Paths)

A 'Filter' step stops the workflow unless a condition is true. A 'Paths' step splits the workflow into different branches based on conditions. Together they enable decision-making automation:

CONDITIONAL PATHS EXAMPLE: Lead Routing by Quality

TRIGGER: New lead form submissionAI STEP: Classify lead as HOT / WARM / COLDPATH A (if HOT): Email sales director immediately + create CRM deal + set follow-up task for todayPATH B (if WARM): Add to weekly nurture email sequence + create CRM contactPATH C (if COLD): Add to quarterly newsletter list only

7.3 Loops and Iterators (Make.com)

For workflows that need to process multiple items from a single trigger — for example, every row in a spreadsheet or every attachment in an email — Make.com's Iterator module processes each item individually. This is beyond Zapier's native capability and is where Make.com's visual canvas becomes essential for high-volume data processing.

7.4 Zapier Central — Proactive AI Agents

Zapier Central (2026) introduces a fundamentally different automation model: instead of waiting for a trigger, an AI agent watches your data continuously and acts when it detects a pattern you define. Examples:

- Watch your Gmail inbox. When you receive more than 3 emails from the same sender in 24 hours, flag the conversation as Priority and notify you on Slack.
- Monitor your Google Sheets sales tracker. When a deal has been 'In Progress' for more than 14 days with no update, automatically send a check-in email to the account manager.

- Observe your calendar. When you have more than 4 back-to-back meetings on any day, suggest a 15-minute break slot and add it to your calendar.

> 🤖 **Reactive vs Proactive Automation**
> Standard automation is reactive: it waits for a trigger event and then acts. Zapier Central enables proactive automation: the AI agent watches continuously and acts on patterns, not just events. This is the 2026 shift from workflow tools to genuine AI agents — systems that observe, reason, and act autonomously within boundaries you define.

Chapter 8: Make.com — Visual Scenario Building

8.1 When to Use Make.com Instead of Zapier

Choose Make.com over Zapier when:

- Your workflow needs to process lists or arrays of items (iterators) — e.g., all attachments in an email, all rows in a spreadsheet
- You need to see data flowing through the workflow in real time for debugging
- Your workflow involves complex data transformation — splitting, aggregating, or reformatting large data structures
- You need the visual canvas to communicate the workflow design to a client or stakeholder
- Cost is a primary concern — Make.com's free tier includes 1,000 operations per month with no restriction on workflow complexity

8.2 Core Make.com Concepts

Concept	What It Does	Zapier Equivalent
Scenario	The complete workflow — trigger + all modules + connections	*Zap*
Module	A single step — an app action, a tool, or a router	*Step / Action*
Router	Splits the flow into multiple conditional paths	*Paths*
Iterator	Processes a list of items one by one (loops)	*No direct equivalent — this is Make's superpower*
Data Store	A built-in database within Make — stores persistent data between scenario runs	*Tables (Zapier) or external Google Sheets*
OpenAI / Claude Module	The AI processing step — same Trigger-Brain-Action logic	*AI by Zapier step*

Chapter 9: Microsoft Power Automate

9.1 The Microsoft 365 Automation Layer

If your organisation's digital life revolves around Outlook, Teams, SharePoint, and Excel, Microsoft Power Automate is the most powerful choice. It is included with most Microsoft 365 subscriptions and provides native, deep integration with the entire Microsoft ecosystem that third-party tools cannot match.

9.2 Highest-Value Power Automate Workflows

- Approval workflows — a document in SharePoint triggers an approval chain sent via Teams or email, with tracked sign-offs and automatic escalation if not approved within 24 hours
- Email processing — incoming Outlook emails matching criteria (keywords, sender, attachment type) are processed by AI Builder and key data is extracted to Excel or Dataverse
- Teams meeting follow-up — when a Teams meeting ends, AI generates a meeting summary + action items from the transcript and posts to the Teams channel
- Excel data validation — when a new row is added to an Excel table on SharePoint, AI validates the data and sends a correction request if fields are missing or incorrect
- Out-of-office management — when calendar shows Busy for more than 4 hours, auto-reply with schedule and colleague contact is activated automatically

> 📌 **Power Automate AI Builder**
> Microsoft's AI Builder (included in Power Automate premium) offers pre-built AI models for document processing, form recognition, and text classification. For Nigerian businesses that receive PDF invoices, scanned forms, or printed documents, AI Builder's 'Process and extract information from documents' model can replace significant manual data-entry work without any model training.

Chapter 10: Real-World Automation Playbook — 20 Ready-to-Build Workflows

10.1 For Individuals & Professionals

Workflow	Trigger-Brain-Action	Time Saved
Email → Daily Brief	*Gmail unread → AI summarises 5 most important emails → morning digest Slack DM at 7am*	**30 min/day**
Meeting Notes → Tasks	*Google Meet ends → AI extracts action items from transcript → Todoist tasks with owners*	**20 min/meeting**
Receipt → Expense Log	*Gmail receipt arrives → AI extracts vendor, amount, date → Google Sheets expense row*	**10 min/receipt**
Social Idea → Multi-Platform	*New note saved in Notion → AI adapts for LinkedIn (formal), Twitter (casual), WhatsApp (brief) → 3 drafts in Gmail*	**45 min/post**
Article Save → Newsletter	*New item saved to Pocket/Readwise → AI writes 2-sentence takeaway → adds to newsletter draft in Notion*	**2 hr/week**

10.2 For Businesses & Organisations

Workflow	Trigger-Brain-Action	Value
Lead → CRM + Welcome	*Website form → AI qualifies + writes welcome email → CRM contact created + email sent*	**Instant response**
Invoice → Tracker + Alert	*Invoice email → AI extracts fields → Sheets row + 'Payment due in 7 days' Slack alert*	**No missed payments**
Review → Response Draft	*New Google Review → AI writes professional reply draft → Gmail for approval*	**Reputation mgmt**
Support Ticket → Routing	*Email to support@ → AI classifies + summarises → assigned to right team member in Trello*	**Faster resolution**
Weekly Report → CEO	*Every Friday 4pm → AI pulls week's CRM data → 3-paragraph performance summary → email to CEO*	**2 hrs/week saved**

Paystack → Thank You	*New payment → AI personalises thank-you + upsell message → WhatsApp + email to customer*	**Customer retention**
Job Application → Screening	*CV email → AI scores against criteria → summary to hiring manager + auto-acknowledgement to applicant*	**10 hrs/hire saved**
Social Mention → Alert	*Brand mentioned on X/Twitter → AI classifies sentiment → negative mentions alerted in Slack instantly*	**Crisis prevention**

Chapter 11: Error Handling & Maintenance

11.1 When Workflows Fail — The Most Common Causes

Automation failures are normal and manageable. Understanding the most common causes allows you to fix them in minutes rather than panicking:

Error Type	What Causes It	How to Fix
Disconnected Account	You changed your password or revoked the app's access permission	Go to Zapier → Connected Accounts → Reconnect the affected app. Re-authenticate.
Missing Required Field	The action step needs a field that the trigger did not provide (e.g., email address not in the form)	Update the source form/trigger to include the required field, or add a filter to stop the Zap when that field is empty.
AI Step Returned Unexpected Format	The AI generated prose where JSON was expected, or vice versa	Update the AI step instruction to explicitly request the format: 'Return ONLY JSON, no other text.'
Rate Limit Hit	Too many Zap runs in a short period exceeded the free tier limit	Upgrade Zapier plan, or add a Delay step to space out runs. Review task consumption in the dashboard.
App API Change	The connected app updated its API and the field name changed	Go to the affected step → re-map the fields using the new field names shown in the current data.

11.2 The History Tab — Your Automation Audit Trail

Every workflow tool maintains a History log of all runs — successful and failed. Check it weekly:

- Zapier: Zap History shows each run, its status, and the data at each step
- Make.com: Scenario History shows a full visual replay of the data flowing through each module
- Power Automate: Run History shows the status of each flow run with detailed logs

The History tab is also where you manually re-run failed workflows after fixing the underlying issue, without losing the original trigger data.

Chapter 12: Ethics & Responsible Automation

12.1 The Human-in-the-Loop Principle

Not every workflow should be fully automated end-to-end. The Human Approval Gate principle (Chapter 4) applies most strongly to:

- Any communication sent on your behalf — automated emails to clients or partners should be reviewed before sending, especially early in deployment
- Financial actions — automated payment approvals, expense logging, or price updates require human oversight
- Hiring and HR decisions — AI-assisted CV screening must include human review before any response is sent to applicants
- Sensitive customer communications — complaint responses, account terminations, or escalation handling

12.2 Data Privacy in Automation Workflows

When you connect apps in a workflow, data flows across multiple third-party services. Consider:

- Customer personal data (names, emails, phone numbers) should only flow through services listed in your privacy policy and NDPA 2023 documentation
- Review the data storage policies of each automation platform — Zapier, Make.com, and Power Automate all log data in their systems temporarily during workflow execution
- For sensitive data (medical, financial, legal), use self-hosted automation tools (n8n) or ensure all connected services are compliant with relevant regulations
- Include a data flow diagram in your organisation's NDPA documentation that maps which apps receive which categories of customer data

12.3 Automation Transparency

- Inform customers when they are receiving automated communications — 'This is an automated confirmation' builds trust rather than eroding it
- Do not use automation to deceive — an automated email that appears personally written when it is not may violate consumer protection regulations in the EU and UK
- Maintain a registry of your active automations and review them quarterly — automated workflows can continue running long after the business need has changed

Chapter 13: Workbook — In-Session Exercises

Complete during the live classroom session.

Exercise 1: The Time Tax Audit

Before touching any tool, identify YOUR automation opportunities.

1	**List 3 tasks you do manually at least 3 times per week that involve copying information between apps:** Your answer: _____
2	**For your top task: what is the Trigger (what event starts it)?** Your answer: _____
3	**What would the AI Brain do with that data? What should it extract, summarise, or generate?** Your answer: _____
4	**What is the Action — where should the processed result go?** Your answer: _____

Exercise 2: Build Drill 1

A	**What exact Copilot prompt did you type to build the Slack → Tasks workflow?** Your answer: _____

B **What test Slack message did you use? What did the AI extract — action item and deadline?**

Your answer: _____

C **What would you change in the AI step instruction to also capture the name of the person who needs to do the task?**

Your answer: _____

Exercise 3: Design Your Most Valuable Workflow

A **Name the workflow you would build first after this session. What problem does it solve?**

Your answer: _____

B **Write the Copilot prompt you would use to build it:**

Your answer: _____

C **Would this workflow need a Human Approval Gate? Why or why not?**

Your answer: _____

Chapter 14: Day 9 Assignment — Your Personal Automation Stack

> ⚡ **Build 2 Automations That Eliminate Real Work From Your Week**
>
> *Complete before Day 10. Estimated time: 30-45 minutes.*

The Task

Build two Zapier automations using real tools you actually use. At least one must include an AI processing step. Run a test on each to confirm data flows correctly.

Automation 1 — Choose From the Playbook or Design Your Own

15. Run the Time Tax Audit from Exercise 1 and identify your highest-value automation opportunity.
16. Open Zapier → Create with AI (Copilot).
17. Type your Copilot prompt — include the AI Brain step if your workflow needs data processing.
18. Connect your accounts and map the fields.
19. Run a test with real or simulated data. Verify the output is correct.
20. If needed, refine the AI step instruction — ask for JSON output if the result feeds into form fields.
21. Publish the Zap. Let it run live for 24 hours and check History.

Automation 2 — The Weekly Report Generator

Build Drill 3 (Weekly Report Generator) from Chapter 6 using your own tasks and your own email. This is a Schedule-triggered automation — no external app event needed.

22. Set the trigger: Zapier Schedule → Every Monday at 7:00 AM (your time zone).
23. Add a data source step: pull last week's completed tasks from Google Tasks, Todoist, or a simple Google Sheet you maintain.
24. Add an AI step with this instruction:

WEEKLY REPORT AI INSTRUCTION:

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Based on the tasks listed below, write a professional weekly report with three sections:1. THIS WEEK'S ACCOMPLISHMENTS (3-5 bullet points summarising what was completed)2. KEY OUTCOMES (1-2 sentences on the impact or results of the week's work)3. TOP 3 PRIORITIES FOR NEXT WEEK (numbered list)Tone: Professional but concise. Suitable for sharing with a manager or keeping as a personal record.
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25. Add Gmail action: send the AI-generated report to yourself.

26. Test with sample task data. Refine the instruction if the report format needs adjustment.
27. Publish and schedule for next Monday.

Reflection Questions

1	**How much time per week will your first automation save? Be specific — count the minutes per occurrence and multiply by weekly frequency.** Your answer: _____
2	**Did your AI step return the expected output on first test? If not, what instruction change fixed it?** Your answer: _____
3	**Does either of your automations need a Human Approval Gate? Where would you place it and why?** Your answer: _____
4	**What is the third automation you would build after mastering these two?** Your answer: _____

Chapter 15: References & Further Learning

15.1 Core References

- McKinsey Global Institute (2023). The State of AI in 2023: Generative AI's breakout year. Available at: mckinsey.com/capabilities/quantumblack/our-insights
- Zapier (2024). Zapier Copilot Documentation. Available at: help.zapier.com/hc/en-us/articles/copilot
- Make.com (2024). Make Academy — Automation Learning Path. Available at: academy.make.com
- Microsoft (2024). Power Automate AI Builder Documentation. Available at: learn.microsoft.com/en-us/ai-builder
- n8n (2024). n8n Documentation — Self-Hosted Workflow Automation. Available at: docs.n8n.io
- Nigeria Data Protection Commission (2023). Nigeria Data Protection Act: Implementation Guidelines. Available at: ndpb.gov.ng

15.2 Tools to Explore

- Zapier — zapier.com (primary tool — 6,000+ app integrations, Copilot AI builder)
- Make.com — make.com (visual scenario builder, superior for complex data workflows)
- Microsoft Power Automate — powerautomate.microsoft.com (included with M365)
- n8n — n8n.io (open-source, self-hosted, privacy-first)
- Pabbly Connect — pabblyconnect.com (one-time pricing, popular in Nigerian market)
- Zapier Central — zapier.com/central (proactive AI agents, 2026 feature)

15.3 Further Learning

- Zapier Learn — zapier.com/learn (free structured automation courses)
- Make.com Academy — academy.make.com (video tutorials for visual scenario building)
- No Code MBA — nocodemba.com (automation case studies and business applications)
- Ben Tossell's Newsletter — bentossell.com (weekly no-code and automation inspiration)

End of Day 9 eBook

Day 10 — AI for Data & Analysis: Turn Raw Numbers into Decisions

2026 AI Learning Roadmap | Created for beginners, designed for results.