STRATEGIC AI STUDIO

AI Systems. Real Impact.

THE WORKFLOW AUTOMATION STARTER KIT

How many hours a week is your business losing to work your systems should be handling?

Find where time, revenue, and capacity are leaking. Build one useful automation today. Identify what to fix next.

FIND THE LEAK → FIX ONE TODAY → KNOW YOUR NEXT STEP

WHAT'S INSIDE

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I've spent more than 25 years designing and improving business systems, from early automation work at BellSouth Wireless Data to operational turnarounds and P&L leadership.

Today, I help small businesses find where work is breaking down, design the right solution, and implement practical AI-powered systems that save time and improve how the business operates.

25+ YEARS IN BUSINESS SYSTEMS · WORKFLOW AUTOMATION · AI-POWERED OPERATIONS · PROCESS DESIGN · IMPLEMENTATION STRATEGY

The Starter Kit gets you started. Workflow Wednesday helps you build from here — one real automation every week, in plain English. Subscribe free at strategicaistudio.substack.com

PART 01 · THE GUIDE

Start with revenue. Not busywork.

The biggest mistake businesses make when they start automating is choosing the wrong tasks first: internal notifications, file renaming, simple reminders. Then they wonder why nothing really changes. The best place to start is the work closest to revenue: lead capture, follow-up, onboarding, and the handoffs where prospects go cold because no one responded fast enough.

> *"Automate the handoffs first. That is where lead leakage happens: the gap between a prospect showing interest and your business responding. Close that gap and you will see results quickly."*

How every automation works

Every automated workflow has three core components. Once you understand them, it becomes much easier to spot opportunities in your own business.

TRIGGER	The event that starts the workflow	*A new inquiry form is submitted*
ACTION	What happens as a result	*A CRM record is created and an email is sent*
CONDITION	A rule that shapes the flow	*Only if the inquiry type is "new client"*

A simple automation may have one trigger and one action. A complete business system may have dozens of actions, conditions, decisions, and handoffs. But the basic logic is always the same.

> *"AI without a process is just expensive chaos. Before you add AI to a workflow, make sure the underlying process is clear and consistent. Automate a broken process and you get broken results faster."*

What makes something worth automating?

Look for work that is:

- **Frequent:** it happens repeatedly.
- **Consistent:** the process follows a predictable pattern.
- **Manual:** someone is copying, entering, sending, checking, or moving information.
- **Connected:** information needs to move between people or tools.
- **Close to revenue:** delays can cost leads, customers, or cash flow.

Not everything should be automated. The goal is to remove unnecessary manual work so people can spend more time where judgment, expertise, and relationships actually matter.

Where to start

Do not try to automate everything at once. Pick one area where manual work is costing you the most time, revenue, or capacity. Build one clean automation. Measure what changes. Then expand.

For many service businesses, lead response is the best place to begin. A prospect submits an inquiry: what happens next? If the answer depends on someone seeing an email and remembering to respond, you already have a gap worth fixing.

PART 02 · AUTOMATION OPPORTUNITY MAP

Find the system that is costing you the most.

Most businesses do not have an automation problem. They have a business process problem that automation may be able to solve. That distinction matters. Do not start by asking **"What can I automate?"** Start by asking **"Where is work breaking down, and what is that breakdown costing me?"**

BUSINESS PROBLEM	WHAT MAY BE BREAKING	POSSIBLE SYSTEM
Leads go cold	Slow response, missed inquiries, inconsistent follow-up	LEAD RESPONSE + QUALIFICATION
Too much time spent scheduling	Back-and-forth emails, no-shows, manual confirmations	SCHEDULING + REMINDERS
New clients get a poor first experience	Manual setup, missing documents, inconsistent communication	CLIENT ONBOARDING
Prospects disappear after the first conversation	Follow-up depends on memory, proposals are not tracked	FOLLOW-UP + NURTURE
Payments arrive late	Invoices and reminders are sent manually	BILLING + COLLECTIONS
The same information is entered repeatedly	Tools do not communicate with each other	DATA SYNC + INTEGRATION
Customers do not know what is happening	Status updates depend on someone remembering to send them	CUSTOMER COMMUNICATION
The owner cannot see what is working	Data is spread across multiple platforms	REPORTING + DASHBOARD

Find the cost before you build the fix

1 **How often does this happen?**
Once a month may not matter. Twenty times a day does.

2 **How much time does it consume?**
Ten minutes repeated six times a day becomes five hours a week.

3 **What happens when it goes wrong?**
A missed lead, delayed payment, or poor customer experience may cost more than the time itself.

4 **Is the process consistent enough to automate?**
If nobody can explain how the work should happen, fix the process before adding technology.

> *"The best automation opportunity is not always the task that takes the most time. Sometimes it is the small gap that sits closest to the customer or the money."*

NEXT STEP

Not sure which of these problems is costing you the most?
Take the free 2-minute assessment and find your biggest automation gap →
strategicaistudio.com/assessment

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PART 03 · YOUR FIRST AUTOMATION

Build it today: 15 minutes. $0.

Set up an instant response to every new inquiry that comes through your website. It does not need AI, custom software, or clever copy. It simply needs to close the gap between "I'm interested" and "Did anyone get my message?"

TRIGGER
A prospect submits your contact form.

→

ACTION
They immediately receive a confirmation email.

That's it. You have built a real trigger-and-action workflow, the same basic structure behind every automation in this guide.

How to set it up

Most form tools have a built-in confirmation email or autoresponder: check your form settings and turn it on. If yours does not support one, connect the form to your email platform with a workflow tool. The technology is not the important part. The gap is.

Make the reply worth reading

A basic auto-reply buys you time. A good one also builds confidence while the prospect waits. It should do three things:

- **Acknowledge the inquiry** so they know it arrived.
- **Set a clear expectation** with a response time you can actually keep.
- **Give one useful next step** while they wait.

Copy and adapt this:

SUBJECT: GOT YOUR MESSAGE

Hi [first name], thanks for reaching out. Your message came through, and I'll get back to you personally within 2 business hours.

If it's easier, you can skip the wait and grab a time on my calendar here: [scheduling link].

Talk soon, [your name]

Why start here?

Because it is simple, it runs 24 hours a day, and it touches the customer experience directly. But this is only one task. The bigger opportunity is understanding what should happen after the email is sent.

PART 04 · FROM TASK TO SYSTEM

One automation is useful. A complete system changes the business.

The auto-reply you just built solves one problem: the prospect knows their message arrived. But what happens next? Someone may still need to:

- Read the inquiry and decide whether the lead is a good fit
- Enter the contact into the CRM and assign it to the right person
- Send the correct information and schedule the next step
- Follow up if the prospect does not respond
- Update the pipeline and track whether the lead became a customer

This is where businesses often make their second automation mistake. They automate individual tasks without looking at the complete process. The result is a collection of disconnected automations instead of a working system.

From a single task to a complete workflow

	Manual process	Someone sees the inquiry and handles everything by hand
	Single automation	The prospect receives an instant confirmation
	Connected workflow	The contact is created, the owner is notified, and the next step is triggered
	Intelligent system	The inquiry is analyzed, categorized, routed, personalized, tracked, and followed up automatically

The technology becomes more sophisticated. But the starting question stays the same: what should happen next?

Before you build, map the process

A useful system should answer six questions:

What starts the process?
THE TRIGGER

What information is needed?
THE DATA

What decisions have to be made?
THE CONDITIONS

What should happen next?
THE ACTIONS

Where does a human need to step in?
THE JUDGMENT POINTS

How do we know whether it is working?
THE MEASUREMENT

> *"Good automation does not begin with software. It begins with understanding how the work should move."*

That is the difference between automating a task and improving a business. The next page shows what it looks like when the pieces are connected.

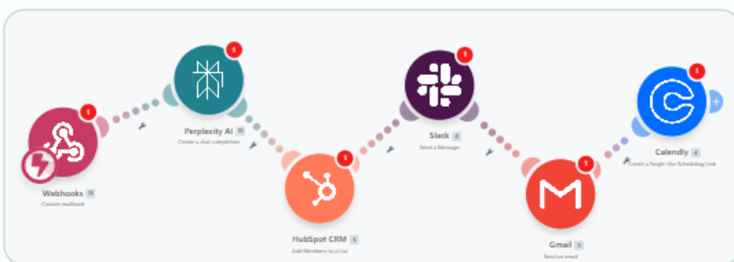
PART 05 · SYSTEM EXAMPLE

A complete lead-response system in action.

The following is a composite example based on common problems seen in service businesses. It is designed to show how separate manual tasks can become one connected workflow.

Imagine a solo consultant spending more than an hour every day answering initial inquiry emails, manually adding contacts to a CRM, scheduling discovery calls back and forth, checking whether prospects responded, and following up on missed opportunities. The problem is not one task. The problem is the handoffs between the tasks. Here is how the process could work instead:

1	**Website form submitted**	A new inquiry enters the system and the workflow starts immediately
2	**Inquiry analyzed**	The message is reviewed, categorized, and checked for fit
3	**CRM updated automatically**	A contact record is created with the inquiry details and source attached
4	**Owner notified**	The right person receives a plain-English summary of what matters
5	**Personalized response sent**	The prospect receives a relevant reply while the problem is still fresh in their mind
6	**Next step triggered**	The prospect can schedule a call, receive information, or enter the correct follow-up sequence



The six-step workflow, built and connected in Make.

What is this system designed to improve?

Response time: from whenever someone notices the email to a response within minutes.
Administrative work: less copying, pasting, data entry, and switching between tools.
Follow-up consistency: fewer prospects forgotten because someone got busy.
Customer experience: clearer, faster communication from the first interaction.
Pipeline visibility: a better record of where leads came from and what happened next.

The exact results depend on the business, the process, the volume of inquiries, and the quality of the implementation. The point is not the number of automations. The point is that the process now works as one connected system.

NEXT STEP

Where is your business losing the most time, leads, or capacity?
Take the free 2-minute assessment and find your biggest automation gap →
strategicaistudio.com/assessment

PART 06 · YOUR NEXT STEP

Find the right next step for your business.

You have seen what a simple automation looks like. You have seen how one task can become a connected system. The next question is: where should you start? There are two ways to find out.

OPTION 01 · ASSESSMENT

Take the free 2-minute assessment

Not sure where the biggest problem is? Answer 12 quick questions about how your business handles leads, onboarding, operations, and follow-up. You will find your biggest automation gap and get a clearer picture of where time, leads, or capacity may be leaking.

Take the assessment →
strategicaistudio.com/assessment

OPTION 02 · AI SYSTEMS CALL

Book a free 30-minute AI Systems Call

Already know something is broken? Let's talk through where your business is losing time, leads, or capacity and determine the right next step. You may need a simple resource from the Academy. You may need a complete AI Solution Blueprint. You may be ready for implementation. Or you may not need anything at all.

The goal is simple: help you find the right path before you spend money on the wrong tools or solutions.

No obligation. No jargon. No sales pitch disguised as advice.

Book your free AI Systems Call →
strategicaistudio.com/call

Stop automating random tasks. Start fixing the work that matters.

Not sure where the problem is? Take the 2-minute assessment

Already know something is broken? Book your free AI Systems Call

KEEP BUILDING

Not ready to take the assessment or book a call?

Keep building with Workflow Wednesday: one practical automation every week, broken down in plain English. Free. No hype. No jargon. →
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