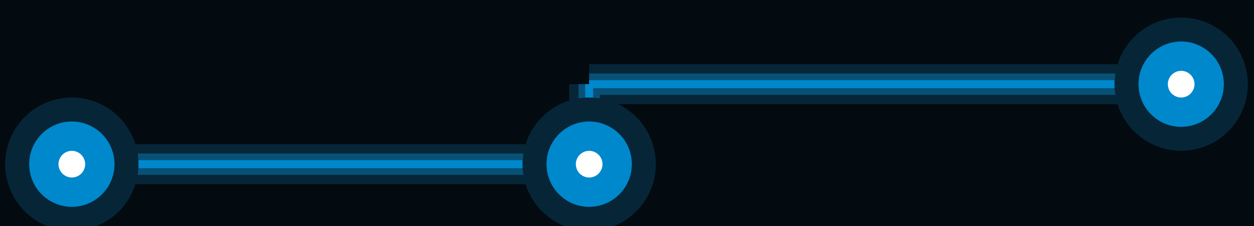
THE POINT SOLUTIONS

A PRACTICAL GUIDE FOR BUSINESS OWNERS

SMALL BUSINESS AI HANDBOOK

Use AI workflows and agents to close the gaps in your small business.



Inquiry **Next step** **Follow-through**

05 WORKFLOWS

COPYABLE PROMPTS + OPPORTUNITY INTAKE

1. Introduction

You finish a busy day, but a new inquiry is still waiting for a reply. A quote went out last week and nobody followed up. The work is complete, yet the invoice has not been sent. These small gaps are easy to overlook when you are focused on serving customers.

Each gap has a cost. Slow follow-up can lose a sale. Missed tasks create delays and disappointed customers. Admin overload uses hours that could go toward delivery or growth. Inconsistent processes make results depend on who is working and what they remember.

AI can help when it has a clear job inside a defined process. It can organize an inquiry, draft a relevant response, summarize information, or prepare content for review. Automation can move that work between steps and remind the right person when action is needed.

The promise of this handbook is simple: identify one leak and fix it first. You will learn how workflows and agents work, use five prompts to design a starting workflow, and complete an Opportunity Intake to choose your next step.

Start with a real example. Think of a lead you replied to late, a task you repeated this week, or a payment you had to chase. Use the scorecard on the next page to decide which problem deserves attention.

The prompts generate a plan. A working system still needs connected tools, clear instructions, testing, and an owner. Start small, keep human oversight where it matters, and track your results.

2. The Revenue Leak Scorecard

Think about the last 30 days. Score each statement: 0 = never, 1 = occasionally, 2 = often, 3 = most of the time. Write a question mark if you do not know and check a few recent records. Use N/A for processes your business does not have.

Potential leak	What to look for	Score
Speed to lead	New inquiries wait longer than our target response time.	___
Missed calls	Missed calls do not receive a timely callback or useful next step.	___
Unfollowed quotes	Open quotes have no scheduled follow-up or assigned owner.	___
No-shows	Missed appointments leave time that we cannot refill.	___
Late invoices	We delay sending invoices or following up on overdue balances.	___
Customer churn	Customers stop buying or renewing without a timely check-in.	___
Manual data entry	We repeatedly copy the same information between tools.	___
Content bottlenecks	Useful content is delayed because drafting or review takes too long.	___
Document errors	Incorrect names, dates, prices, or missing details cause rework.	___

3. Workflows and AI Agents Explained

- What a workflow does. A workflow is a repeatable sequence that moves work from a trigger to an outcome. For example, an inquiry arrives, its details are saved, a response is prepared, and a team member receives a follow-up task. Each step has a clear purpose and owner.

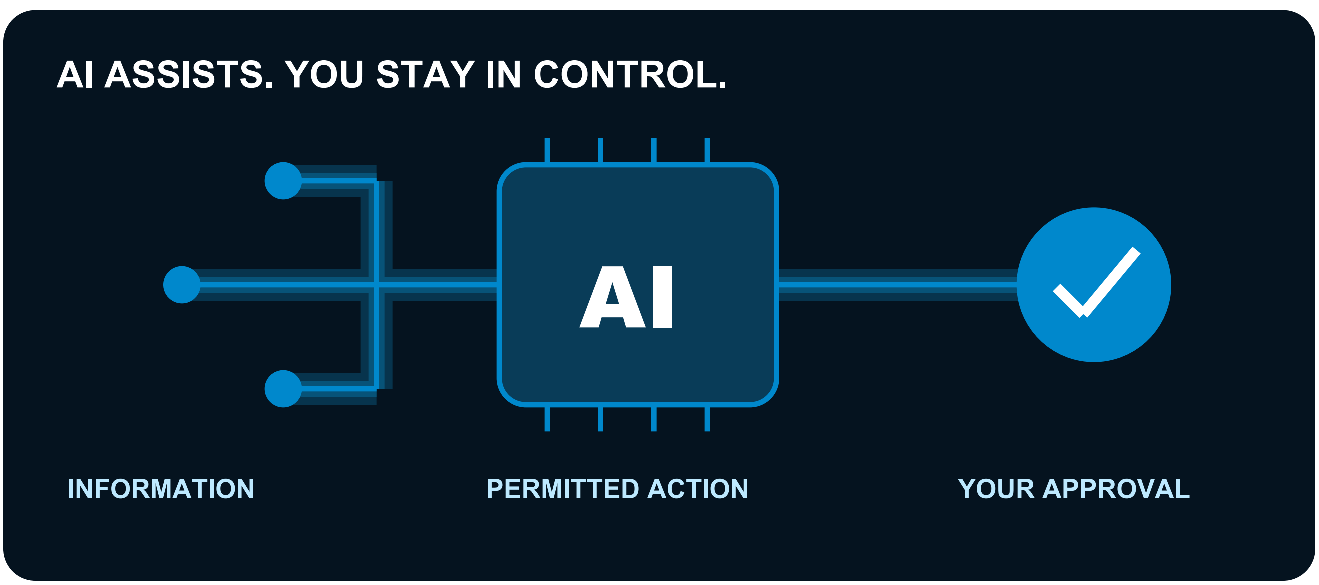
- What automation does. Automation follows rules you set. When an appointment is booked, it can send a confirmation. When an invoice is marked paid, it can stop reminders. These predictable steps often do not need AI.

- What an AI agent does. An AI agent evaluates context, follows your boundaries, and decides the best permitted next step. It might read a customer message, identify the type of request, ask for missing details, or route it to the right person. It needs access to approved information and tools to take those actions.

- How they work together. Imagine a customer asking for a service you offer. Automation captures the inquiry. AI interprets the request and drafts a relevant reply. A person handles unusual requirements. The system records what happened so the next step is not forgotten.

HOW THE PIECES WORK TOGETHER

- Trigger > AI or automation > Human handoff > Outcome > Measurement
- When a human should stay involved. Keep a person responsible for complaints, disputes, unusual requests, pricing exceptions, and commitments to customers. Review draft content and customer messages during testing. Hand off when information is missing, conflicting, or outside the approved process.
- Set the boundaries before launch. Specify what information the system may use, which actions it may take, what needs approval, and who receives exceptions. Test those handoffs as carefully as the normal steps.



4. How to Use These Prompts

1. Choose one problem. Use your scorecard to select the example that fits your business. Work through one before starting another.

2. Copy the complete prompt text across both prompt pages into a single message. Copy only the shaded text. Replace brackets with your details. If you are unsure, write "help me decide."

3. Answer the questions. The assistant should ask about your business before proposing a workflow. Give it a fictional example of a typical customer request or task.

4. Review the plan. Check the trigger, steps, messages, stop rules, and human handoff. Ask it to explain anything you do not understand.

5. Build one stage at a time. Once the plan makes sense, ask for setup instructions for your actual tools. Some steps need account access or a paid feature; have the assistant identify those before you commit.

6. Test before launch. Use fictional records and your own test contact details. Check normal cases and exceptions before enabling customer-facing messages.

IMPORTANT: PROMPT VS. BUILD
These prompts use AI to design your process blueprint and draft your messaging. To make the workflow run automatically in your business, you will later connect your existing tools (like Gmail, Zapier, or your CRM) using the steps the AI provides. Check those steps, test the connections, and approve launch.

WORKFLOW 01

SPEED TO LEAD

01

New inquiries sit unanswered while your team is busy.

1 **CAPTURE**

Save the inquiry and customer details.

2 **UNDERSTAND**

Identify the request and missing information.

3 **RESPOND**

Offer a useful, approved next step.

4 **HAND OFF**

Assign an owner and stop duplicate follow-ups.

BEFORE YOU CONNECT ANYTHING

Use the next two prompt pages to define rules, messages, and handoffs. Test the normal path and exceptions before launch.

Workflow 1. Speed to lead

New inquiries sit unanswered while your team is busy.

Copy both prompt pages into one message. Fill in the brackets before sending.

Prompt page 1 of 2

Help me build my first speed to lead workflow. I have limited technical experience. Guide me step by step, explain unfamiliar terms, and avoid a long list of tools.

My business: What I sell: [product or service]. Who buys: [customers]. Inquiry channels: [website form, email, social media]. Customer records: [CRM, spreadsheet, inbox, or unsure]. Booking tool: [tool or none]. Response owner: [person]. Business hours: [hours].

My goal: each inquiry receives a useful response quickly, a clear next step, and an assigned owner. Ask what customers typically want, which details we need, how quickly we should respond, and which requests need a person.

Start by asking up to five questions. Wait for my answers before designing the workflow. If I write "help me decide," explain the simplest sensible options.

Prompt page 2 of 2

After I answer, produce this plan: Define the exact trigger and steps. Write the first response, up to three qualifying questions, and one follow-up. Show what happens if someone replies, books, declines, opts out, or does not respond. Stop the pending sequence when a person takes over.

List the customer details and status to save, how to avoid duplicate replies, who receives exceptions, and what to do if a notification fails. Do not invent prices, availability, or promises.

Use the shared build instructions above: use existing tools where possible, separate automation from AI, identify access and costs, and give setup instructions one stage at a time after approval.

Help me test: Test a normal inquiry, one with missing details, and one requiring judgment. State the expected reply, saved status, and handoff for each. Measure time to useful response, unanswered inquiries, and bookings.

What to say next

After reviewing the plan, continue in the same conversation. For example:

I use a website form, Gmail, and a booking calendar. Walk me through capturing one test inquiry first. Explain what I need to do myself.

WORKFLOW 02

MISSED CALL RECOVERY

02

Potential customers reach voicemail and never call again.

1. **DETECT**
   Record the missed call.

2. **RECONNECT**
   Send an appropriate reply or callback task.

3. **ROUTE**
   Assign urgent or unusual requests to a person.

4. **RESOLVE**
   Record the outcome and stop follow-up.

BEFORE YOU CONNECT ANYTHING

Use the next two prompt pages to define rules, messages, and handoffs. Test the normal path and exceptions before launch.

Workflow 2. Missed Call Recovery

Potential customers reach voicemail and never call again.

Copy both prompt pages into one message. Fill in the brackets before sending.

Prompt page 1 of 2

Help me build my first missed call recovery workflow. I have limited technical experience. Guide me step by step, explain unfamiliar terms, and avoid a long list of tools.

My business: What I sell: [service]. Phone system: [name or unsure]. Business hours: [hours]. Callback owner: [person]. Booking tool: [tool or none]. Where calls are logged: [tool]. Current missed-call process: [describe].

My goal: missed callers have a clear next step and a person responsible for responding. Ask how missed calls are detected, whether texting is available and appropriate, which calls are urgent, and how quickly we can realistically call back.

Start by asking up to five questions. Wait for my answers before designing the workflow. If I write "help me decide," explain the simplest sensible options.

Prompt page 2 of 2

After I answer, produce this plan: Define what counts as a missed call. Propose the steps from missed call to assigned callback. Draft a short text where appropriate and a callback script. Give a fallback for numbers that cannot receive texts. Do not assume the phone system supports automatic messages.

Set business-hour and after-hours rules. Avoid duplicate texts for repeated calls. Stop automated follow-up when the caller responds, books, opts out, or reaches a person. Route urgent requests to an approved human process; do not promise emergency assistance.

Use the shared build instructions above: use existing tools where possible, separate automation from AI, identify access and costs, and give setup instructions one stage at a time after approval.

Help me test: Test a normal missed call, an after-hours call, and a repeated call from the same number. State the expected message or fallback and assigned owner. Measure callback time, recovered conversations, and bookings.

What to say next

After reviewing the plan, continue in the same conversation. For example:

My phone system cannot send texts. Show me the simplest callback-task version using the tools I have.

WORKFLOW 03

QUOTE FOLLOW-UP

03

Quotes are sent, then nobody follows up consistently.

1. **RECORD**
   Track the sent quote and decision date.
2. **CHECK**
   Check the latest reply and quote status.
3. **FOLLOW UP**
   Send a helpful message if still appropriate.
4. **HAND OFF**
   Route objections and pricing changes.

BEFORE YOU CONNECT ANYTHING

Use the next two prompt pages to define rules, messages, and handoffs. Test the normal path and exceptions before launch.

Workflow 3. Quote Follow-Up

Quotes are sent, then nobody follows up consistently.

Copy both prompt pages into one message. Fill in the brackets before sending.

Prompt page 1 of 2

Help me build my first quote follow-up workflow. I have limited technical experience. Guide me step by step, explain unfamiliar terms, and avoid a long list of tools.

My business: What I sell: [service]. Quote tool: [name]. Customer records: [tool]. Typical decision time: [days]. Quote expiry: [terms]. Follow-up owner: [person]. Approved pricing and FAQs: [source or none].

My goal: every open quote has a useful next action without pestering the customer. Ask how we know a quote was sent, how customers respond, what follow-up timing fits our sales cycle, and who handles objections.

Start by asking up to five questions. Wait for my answers before designing the workflow. If I write "help me decide," explain the simplest sensible options.

Prompt page 2 of 2

After I answer, produce this plan: Define the trigger using a sent quote, not an unfinished draft. Suggest a short follow-up schedule for my approval. Write a receipt check, a helpful question, and a final check-in. Do not invent urgency or discounts.

Check the latest quote and conversation status before each message. Stop on reply, acceptance, decline, expiry, or opt-out. Assign objections and pricing changes to a person. Explain how revised quotes replace the old sequence.

Use the shared build instructions above: use existing tools where possible, separate automation from AI, identify access and costs, and give setup instructions one stage at a time after approval.

Help me test: Test an unanswered quote, a customer reply before a scheduled message, and an accepted quote. State which messages should send or stop. Track quotes with a next action, acceptance rate, and time to decision.

What to say next

After reviewing the plan, continue in the same conversation. For example:

Draft the first two follow-up emails using this fictional quote. Then show how the workflow checks for a reply before sending.

WORKFLOW 04

CONTENT DEVELOPMENT

04

Useful expertise stays in your head because content takes too long.

1. **COLLECT**
   Start with one useful source.
2. **DRAFT**
   Adapt content to your audience and channel.
3. **REVIEW**
   Check accuracy, voice, and claims.
4. **PUBLISH**
   Schedule only the approved version.

BEFORE YOU CONNECT ANYTHING

Use the next two prompt pages to define rules, messages, and handoffs. Test the normal path and exceptions before launch.

Workflow 4. Content Development

Useful expertise stays in your head because content takes too long.

Copy both prompt pages into one message. Fill in the brackets before sending.

Prompt page 1 of 2

Help me build my first content development workflow. I have limited technical experience. Guide me step by step, explain unfamiliar terms, and avoid a long list of tools.

My business: [describe business]. Customers: [audience]. Services: [list]. Channels: [list]. Source material: [voice notes, FAQs, or articles]. Tone example: [paste a short sample]. Reviewer: [person]. Publishing tool: [name or none].

My goal: turn one useful source into accurate content I can approve. Ask about my audience, the question this source answers, my tone, the desired next action, and how much content I can realistically review.

Start by asking up to five questions. Wait for my answers before designing the workflow. If I write "help me decide," explain the simplest sensible options.

Prompt page 2 of 2

After I answer, produce this plan: Map source collection, drafting, review, revision, and scheduling. From my source, draft one article or newsletter, three social posts, five short-form ideas, one FAQ, and one call to action. Adapt each to the selected channel instead of repeating the same text.

Separate source-supported facts from suggestions. Flag missing evidence and do not invent testimonials, results, or customer stories. If no source is provided, ask for one before drafting. Keep everything in draft until I approve it.

Use the shared build instructions above: use existing tools where possible, separate automation from AI, identify access and costs, and give setup instructions one stage at a time after approval.

Help me test: Test a clear source, a source missing an important fact, and a rejected draft. Explain what should be drafted, flagged, revised, or withheld. Track review time, publishing consistency, and relevant inquiries.

What to say next

After reviewing the plan, continue in the same conversation. For example:

Here is a fictional five-minute voice-note transcript. Create one newsletter draft first so I can approve the tone before you make the other pieces.

WORKFLOW 05

INVOICE AND PAYMENT FOLLOW-UP

05

Completed work is not invoiced or overdue balances are missed.

1. **CONFIRM**
   Verify completion and approved amounts.
2. **INVOICE**
   Prepare, approve, and send the invoice.
3. **CHECK**
   Verify payment status before reminders.
4. **RESOLVE**
   Stop on payment; route disputes to a person.

BEFORE YOU CONNECT ANYTHING

Use the next two prompt pages to define rules, messages, and handoffs. Test the normal path and exceptions before launch.

Workflow 5. Invoice and Payment Follow-Up

Completed work is not invoiced or overdue balances are missed.

Copy both prompt pages into one message. Fill in the brackets before sending.

Prompt page 1 of 2

Help me build my first invoice and payment follow-up workflow. I have limited technical experience. Guide me step by step, explain unfamiliar terms, and avoid a long list of tools.

My business: [describe business]. Invoice tool: [name]. Job tracking: [tool]. Payment terms: [terms]. Payment status source: [tool]. Invoice approver: [person]. Current reminder process: [describe].

My goal: completed work is invoiced promptly and unpaid invoices receive appropriate reminders. Ask how completion is confirmed, who approves amounts, how payment status is updated, and how disputes are handled.

Start by asking up to five questions. Wait for my answers before designing the workflow. If I write "help me decide," explain the simplest sensible options.

Prompt page 2 of 2

After I answer, produce this plan: Map job completion, draft invoice, approval, sending, and reminders. Propose reminder timing for my approval. Write a pre-due reminder, an overdue reminder, and a human escalation note. Use approved amounts and terms; do not invent fees.

Check payment status before every reminder. Stop or pause on payment, partial payment, dispute, cancellation, or human takeover, with a specific next action for each. Prevent duplicate invoices. If status cannot be verified, route to a person instead of sending a demand.

Use the shared build instructions above: use existing tools where possible, separate automation from AI, identify access and costs, and give setup instructions one stage at a time after approval.

Help me test: Test an unpaid invoice, a payment received just before a reminder, and a disputed amount. State the expected send, stop, or handoff. Track completion-to-invoice time, overdue balances, and time to payment.

What to say next

After reviewing the plan, continue in the same conversation. For example:

Use a fictional invoice for $500 due in 14 days. Show the approval step and how a payment stops the next reminder.

6. Opportunity Intake

Take your top three circled items from the Revenue Leak Scorecard (starting on page 3) and score them below using the 1-5 matrix to find your single best starting point.

The earlier 0-3 score spots recurring problems. This separate 1-5 comparison weighs business impact, frequency, and ease. Reassess each factor; do not copy the earlier score.

Impact: 1 = small inconvenience; 3 = meaningful time or revenue cost; 5 = major cost. Frequency: 1 = monthly or less; 3 = weekly; 5 = daily. Ease: 1 = major changes needed; 3 = some setup; 5 = simple fix with existing tools. Use 2 or 4 for points in between.

Opportunity	Impact	Frequency	Ease	Total
1. ___________	___	___	___	___
2. ___________	___	___	___	___
3. ___________	___	___	___	___

Choose your starting point

Multiply Impact x Frequency x Ease for each row. The highest total is a starting suggestion, not a promised return. If scores tie, choose the clearer, easier-to-test fix. Complete the next page for that one opportunity.

Describe your chosen opportunity

Use a recent example so your answers lead to a concrete workflow.

Question	Your answer
What process is repetitive or often delayed?	
Where do leads or customers get stuck?	
What does this cost in time, money, or missed sales?	
How often does it happen?	
Which tools are already involved?	
What must a person approve?	
What would improve in 30 days?	

Your 30-day starting plan

Week 1: Choose one leak. Measure the current process and collect recent examples.

Week 2: Use the relevant prompt to map the steps. Identify the tools, instructions, and person responsible.

Week 3: Test normal cases and exceptions. Review messages and confirm that human handoffs work.

Week 4: Launch on a small scale. Compare results with your starting measurements and improve the weak step.

The five prompts in this handbook help you design a starting workflow. Replace the bracketed details with your own business information, then review the proposed steps before connecting tools or enabling messages.

Choose one leak to investigate

Circle your three highest scores. Beside each, note one recent example and its effect: staff time, missed sales, delayed cash, or rework. This is a self-assessment, not a financial estimate.

Choose the problem with the clearest cost and a manageable first fix. A high frequency score alone does not tell you which problem is most valuable to solve.

You have found the opportunity. Let us build the workflow.

You do not have to connect every tool and figure out every step yourself. Bring your Opportunity Intake, or just the one process you want to improve, and we can work out a practical next step.

Start a conversation with Jeff. I can help you identify where you are losing time or revenue, choose the right first workflow, and map out a practical next step.

Click the button below to open your email app. Tell me which process you want to improve and the tools you already use. Your PDF viewer may ask permission to open Mail.

EMAIL JEFF ABOUT MY WORKFLOW

jeff@thepointsolutions.com

If the button does not open your email app, send a message to the address above with the subject AI Workflow Strategy Call. Include your business, the process, and the tools you use.

Jeff | The Point Solutions