

# The Owner's *Playbook*

Twelve workflows that quietly eat your week — how to price them, pick one and fix it in 30 days.

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01 Missed-call text-back

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02 All your leads in one place

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03 Self-booking with screening questions

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04 Reminders and rebooking

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05 Quote follow-up

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07 Document and receipt reading

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12 The Monday numbers email

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START HERE

## Where your week really goes

Most small business owners spend a surprising share of the week on work no customer ever sees: retyping the same details, chasing replies, moving appointments, rebuilding the same report. None of it shows up on an invoice. All of it comes out of the time you meant to spend selling, serving customers — or going home.

This playbook covers twelve workflows that show up in almost every small business. For each one you'll see what starts it, what it does, how to put a dollar figure on it with your own numbers — and, just as important, when it isn't worth building.

### By the end you'll have:

- A yearly dollar figure for your manual work — and the realistic share a machine could take
- Twelve workflows scored against your business
- A shortlist of the two or three to build first
- A 30-day plan to build them alongside your actual job

Reading takes about 20 minutes; the worksheets take about 15. You don't need to be technical, and nothing here requires hiring anyone.

**This is the printable edition.** The two worksheets are meant to be printed and filled in with a pen — each one starts with a short “how to fill this in” box and a worked example. If you'd rather type your answers and have the math done for you, use the interactive version at [promptolution.com/playbook](https://promptolution.com/playbook).

## The hour audit

An automation is worth exactly what the manual version costs you — and most owners have never priced that. Do it now, roughly, from memory. For each row, enter the hours **everyone combined** spends in a normal week. Estimate high: the work you forget is usually the work that hurts.

Then set what an hour is really worth. For staff, that's wages *plus* payroll taxes, benefits and overhead — usually well above the number on the paycheck. For your own time, use what you could bill or sell in that hour.

Last, for each row, decide honestly how much a machine could handle without a person checking it. That share is the realistic prize.

### HOW TO FILL THIS IN

Print this page and use a pen. Prefer to type? The interactive version at [promptolution.com/playbook](https://promptolution.com/playbook) does the math for you.

1. Write what an hour is worth at the top.
2. For each row, write the hours per week — everyone combined.
3. **Cost / year** = hours × your hourly value × 48.
4. Circle how much a machine could do: **None** (× 0), **Half** (× 0.5) or **Most** (× 0.8).
5. **Savings / year** = cost / year × that number.
6. Add up each column for your totals.

**Example:** 3 hrs/week × \$40 × 48 = \$5,760 cost per year. Circle Half: \$5,760 × 0.5 = \$2,880 savings per year.

What an hour is worth: \$ \_\_\_\_\_

| WORK | HOURS /<br>WEEK | COST / YEAR | A MACHINE COULD DO<br>(CIRCLE ONE) | SAVINGS /<br>YEAR |
|------|-----------------|-------------|------------------------------------|-------------------|
|------|-----------------|-------------|------------------------------------|-------------------|

### 01 Answering calls, texts and messages

Picking up, calling back, replying to texts and DMs — including after hours.

\_\_\_\_\_ \$ \_\_\_\_\_ None · Half · Most \$ \_\_\_\_\_

| WORK                                                                                                                                 | HOURS /<br>WEEK | COST / YEAR | A MACHINE COULD DO<br>(CIRCLE ONE) | SAVINGS /<br>YEAR |
|--------------------------------------------------------------------------------------------------------------------------------------|-----------------|-------------|------------------------------------|-------------------|
| <b>02 Scheduling and rescheduling</b><br>The back-and-forth to find a time, plus moving appointments that change.                    | _____           | \$ _____    | None · Half · Most                 | \$ _____          |
| <b>03 Following up on quotes and leads</b><br>Checking in on estimates, proposals and inquiries that went quiet.                     | _____           | \$ _____    | None · Half · Most                 | \$ _____          |
| <b>04 Retyping information</b><br>Copying the same names, addresses and order details from one system into another.                  | _____           | \$ _____    | None · Half · Most                 | \$ _____          |
| <b>05 Collecting documents and signatures</b><br>Chasing forms, photos, IDs and contracts from customers.                            | _____           | \$ _____    | None · Half · Most                 | \$ _____          |
| <b>06 Producing routine paperwork</b><br>Quotes, invoices, letters and reports built by hand from a template.                        | _____           | \$ _____    | None · Half · Most                 | \$ _____          |
| <b>07 Answering the same questions</b><br>Hours, prices, availability, "where's my order?" — things you've answered a hundred times. | _____           | \$ _____    | None · Half · Most                 | \$ _____          |
| <b>08 Giving status updates</b><br>Telling customers where their job, order or case stands.                                          | _____           | \$ _____    | None · Half · Most                 | \$ _____          |
| <b>09 Chasing payments</b><br>Finding unpaid invoices, sending reminders, making the awkward call.                                   | _____           | \$ _____    | None · Half · Most                 | \$ _____          |
| <b>10 Pulling numbers together</b><br>Copying figures into a spreadsheet so you can see how the week went.                           | _____           | \$ _____    | None · Half · Most                 | \$ _____          |
| <b>Totals</b>                                                                                                                        | _____           | \$ _____    |                                    | \$ _____          |

Compare your total **savings** — not the full cost — against a build that starts at \$3,000.  
Decide row by row, not in bulk.

## Twelve workflows worth knowing

Each one shows what starts it, what it does, what you'll need, how to value it for your business, and when to skip it. **Read the "skip it if" first** — it will save you more than anything else on the page.

## Missed-call text-back

Every unanswered call gets a text within a minute.

*Your hands are full — literally — when the phone rings. Most people who reach voicemail don't leave a message. They hang up and try the next business in the search results.*

[HOME SERVICES](#)[CONSTRUCTION](#)[HEALTHCARE](#)[SALONS & SPAS](#)[AUTO REPAIR](#)

### WHAT STARTS IT

A call to your business number rings out, is declined or goes to voicemail.

### WHAT YOU'LL NEED

A business phone service that can send texts, an automation platform, and a place to keep contacts — a CRM or even a spreadsheet.

### WHAT IT'S WORTH

Count last month's missed calls from new numbers. Multiply by how often a new caller becomes a customer, then by your average job. That's the revenue slipping through the gap every month.

### WHAT IT DOES

1. Spot the missed call immediately — not when someone checks the log tonight.
2. Text from your business number: who you are, that you saw the call, and one simple question.
3. Offer two ways forward: reply by text, or pick a time online.
4. Log the call and the conversation on the customer's record.
5. Alert a named person if the caller replies and nobody responds within the time you set.

### SKIP IT IF

Calls are almost always answered live, or most of your callers are vendors and robocalls rather than customers.

## 02

### All your leads in one place

Every inquiry, from every channel, in one list — answered fast.

*Inquiries arrive through the website, email, Facebook, Google and somebody's personal cell. Nobody knows the real total. Some people get two replies; others get none.*

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#### WHAT STARTS IT

A new inquiry arrives on any channel.

#### WHAT YOU'LL NEED

Your lead sources (forms, email, social inboxes), an automation platform, a CRM, and team chat or text alerts.

#### WHAT IT'S WORTH

For one month, count the leads that never got a reply and the ones that got two. Multiply the first number by how often a lead becomes a customer and by your average sale.

#### WHAT IT DOES

1. Bring every channel into a single queue.
2. Match on phone and email so repeat inquiries merge instead of doubling up.
3. Record where each lead came from and when it arrived.
4. Send a quick, personal first reply — AI can answer routine questions from answers you've approved.
5. Assign an owner by a simple rule and notify them where your team already works.

#### SKIP IT IF

You get a handful of inquiries a week and one person handles them all. A shared inbox and a daily habit will do.

## 03

### Self-booking with screening questions

Customers book themselves — and poor fits are filtered out first.

*One appointment takes six messages to arrange. And some of the calls you finally book were never going to work: the wrong service, the wrong area or the wrong budget.*

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#### WHAT STARTS IT

Someone opens your booking link.

#### WHAT YOU'LL NEED

A scheduling tool that supports questions and routing, your calendar, and your CRM.

#### WHAT IT'S WORTH

Track what share of booked calls turn out to be poor fits. Multiply by the number of calls, how long they last and what an hour is worth.

#### WHAT IT DOES

1. Ask a few short questions first: what they need, where they are, when, and budget or insurance if it matters.
2. Show open times to good fits; point everyone else to a helpful alternative.
3. Offer only slots that match the service, its real length and the right person.
4. Save their answers to the calendar event and the customer record.
5. Confirm with prep instructions for that specific appointment.

#### SKIP IT IF

Almost every inquiry is a good fit. Then a plain booking link wins — extra questions just cost you bookings.

## 04

### Reminders and rebooking

Fewer no-shows, and cancelled slots filled again.

*A no-show leaves a paid hour of your team's time with nothing in it. Usually the customer didn't mean to skip — they forgot, or something came up and calling felt like a hassle.*

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#### WHAT STARTS IT

An appointment is booked.

#### WHAT YOU'LL NEED

Your scheduling system, text and email, and a waitlist.

#### WHAT IT'S WORTH

Multiply last month's no-shows by your average appointment value. Then be honest about how many were simple forgetting — that's the part reminders can fix.

#### WHAT IT DOES

1. Confirm right away with the time, the address and anything to bring.
2. Remind early enough that the slot could still be refilled — and again on the day.
3. Put a one-tap reschedule link in every message.
4. When someone cancels, offer the slot to your waitlist automatically.
5. Flag repeat no-shows so your team can ask for a deposit next time.

#### SKIP IT IF

No-shows are already rare, or most bookings happen the same day.

## Quote follow-up

No estimate dies of silence.

*The quote goes out, the week gets busy, and by the time you think of it again, checking in feels awkward. So the work quietly goes to whoever did follow up.*

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### WHAT STARTS IT

A quote, estimate or proposal is sent.

### WHAT YOU'LL NEED

Your quoting tool or CRM, email and text, and a way to detect replies.

### WHAT IT'S WORTH

Look at your last 30 quotes and count the ones that never got a follow-up. Multiply by your win rate and your average job.

### WHAT IT DOES

1. Start the follow-up the moment the quote goes out.
2. Send three or four short messages over two to three weeks, each with one purpose: confirm it arrived, answer the usual question, offer options, then close the loop.
3. Stop the instant they reply, book, sign or pay.
4. Tell whoever wrote the quote when it's been opened but not answered.
5. Close out old quotes on a schedule and move them to a slower check-in list.

### SKIP IT IF

You win or lose on the call and the written quote is only a formality.

## 06

### Won-deal handoff

A signed deal starts the work — without asking the customer everything twice.

*The contract is signed, but the details live in one person's memory and inbox. The new customer's first experience is answering the same questions all over again.*

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#### WHAT STARTS IT

A deal is marked won, or a contract comes back signed.

#### WHAT YOU'LL NEED

Your CRM, a project or job tool, document templates, and email or team chat.

#### WHAT IT'S WORTH

Time one handoff today, back-and-forth included. Multiply by deals per month and what an hour is worth — then add the cost of work that started late.

#### WHAT IT DOES

1. Create the project, job or file from the deal automatically.
2. Carry over everything already collected: scope, contacts, dates, notes and files.
3. Build the task list from a template for that service, with owners and due dates.
4. Send the customer one welcome message: next steps, who to contact and anything still needed.
5. Post a short handoff summary where your team works, linked to the record.

#### SKIP IT IF

You win a few jobs a month and the person who sells is the person who delivers. A checklist is enough.

## Document and receipt reading

Photos, PDFs and forms become clean data.

*Customers send paperwork as photos, scans and attachments. Someone opens each one, reads it, types the details into a system, renames the file and files it away. Every time.*

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### WHAT STARTS IT

A document arrives by email, upload or phone photo.

### WHAT YOU'LL NEED

An upload form or intake inbox, an AI service that reads documents, your accounting or records system, and file storage.

### WHAT IT'S WORTH

Count documents per month and time yourself on five. Documents × minutes ÷ 60 = hours per month; value them at the pay rate of whoever types them today.

### WHAT IT DOES

1. Collect files from every route into one place.
2. Identify the document type and pull out only the fields you actually use.
3. Send anything uncertain to a person — never guess.
4. Write the fields into your system and file the document by your naming rules.
5. Confirm receipt to the sender and list anything still missing.

### SKIP IT IF

Documents already arrive in a clean, consistent format — or you get so few that checking the results would take longer than typing them.

## Status updates

Customers know where things stand — without calling.

*A surprising share of calls are customers asking for an update. Someone in the office interrupts someone in the field to find out, then calls the customer back. Two people stop working to answer one question.*

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### WHAT STARTS IT

A job, order or case changes status.

### WHAT YOU'LL NEED

A job, order or case system that tracks status, text and email, and file storage.

### WHAT IT'S WORTH

Count update calls for one week.  
Multiply by minutes per call — double it  
when the office has to interrupt the  
field — then by 48 working weeks.

### WHAT IT DOES

1. Send an update the moment the status changes — nobody has to remember.
2. Tell the customer what they care about: who, when and what happens next.
3. Attach photos or completion forms to the record as they come in.
4. Alert a person when something sits in one status too long.
5. Send the “all done” message with the invoice or aftercare instructions attached.

### SKIP IT IF

Your team already keeps customers posted and customers like it that way. Keep what works and focus on the calls still reaching the office.

## Invoice follow-up

Collections run on a schedule, not on memory.

*Invoices go out and money arrives whenever it arrives. Nobody owns the follow-up, so it happens when cash gets tight — the worst possible time to have that conversation.*

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### WHAT STARTS IT

An invoice is coming due, or goes past due.

### WHAT YOU'LL NEED

Your invoicing or accounting software, email and text, and online payment links.

### WHAT IT'S WORTH

Look at how many days it takes to get paid on average and what you bill each month. Every day you take off that cycle is a day you're not financing your customers.

### WHAT IT DOES

1. A friendly reminder with the invoice and a payment link right in the message.
2. Firmer reminders on a fixed schedule, then a phone task for a named person.
3. Stop everything the moment payment arrives — even a partial one.
4. A weekly list for you of what's 30, 60 and 90 days late, largest first.
5. Flag slow payers so the next job includes a deposit.

### SKIP IT IF

Customers pay upfront or at the time of service, or your bookkeeper already works the list every week.

## Review requests and check-ins

Every customer is asked; problems reach you first.

*Satisfied customers get on with their day. Unhappy ones go looking for the review button. Asking everyone, every time, evens that out.*

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### WHAT STARTS IT

A job, order or visit is completed.

### WHAT YOU'LL NEED

Your job or order system, text and email, and your review profile link.

### WHAT IT'S WORTH

Compare jobs completed each month with reviews received. The gap is the ask you're not making — weigh it against what you pay for leads today.

### WHAT IT DOES

1. Wait until the work is truly finished but still fresh in their mind.
2. Send one short thank-you with your review link.
3. Invite them to reply directly if anything wasn't right.
4. Alert the owner immediately when a reply mentions a problem.
5. Skip anyone with an open complaint or a recent request.

### SKIP IT IF

Your service quality is uneven right now. More reviews only help if they'll be good ones — fix delivery first.

### GOOD TO KNOW

Ask every customer, not just the happy ones. Google's rules don't allow selectively asking only satisfied customers for reviews.

## Win-back and reorder reminders

Past customers hear from you before they drift away.

*A customer who bought from you twice hasn't been back in a year, and nothing flagged it. Software tells you when something happens — it rarely tells you when something stops.*

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### WHAT STARTS IT

A customer passes their usual gap since the last order, service or visit.

### WHAT YOU'LL NEED

Your order or service history, an automation platform, and email or text.

### WHAT IT'S WORTH

Count customers past their usual gap. Multiply by your average order and by the response rate you see on your own first send — not a number from an article.

### WHAT IT DOES

1. Set the gap for each kind of customer: reorder cycle, service interval, annual checkup.
2. Check daily for anyone who's crossed it.
3. Send a message that mentions what they actually bought or had done.
4. Offer one clear next step: reorder, book the service or schedule the visit.
5. Stop for anyone who responds, buys or unsubscribes — and limit how often anyone is contacted.

### SKIP IT IF

What you sell is truly a one-time purchase and you have no genuine reason to contact them again.

## The Monday numbers email

Your weekly report builds itself before you wake up.

*Every week someone rebuilds the same report by hand from four different systems. It's late, it's tedious, and nobody fully trusts it.*

EVERY INDUSTRY

### WHAT STARTS IT

Every Monday morning, before your team meeting.

### WHAT YOU'LL NEED

Access to the systems where your numbers live, an automation platform, and email or chat.

### WHAT IT'S WORTH

Time whoever builds the report now × 48 weeks × what an hour is worth. The bigger payoff is making decisions on Monday instead of Thursday.

### WHAT IT DOES

1. Pick five to eight numbers you'd actually act on, and write down the decision each one drives.
2. Pull each number automatically from where it lives.
3. Compare with last week and with your target.
4. Have AI write a short summary of the biggest changes at the top.
5. Link each number to its source so anyone can check it.

### SKIP IT IF

You can't name the decision a number drives. If it doesn't change what you do, leave it out.

## Which one first

You now have twelve candidates and, most likely, the time to build one or two. Choosing badly is the most common failure: owners start with the most interesting workflow instead of the most expensive problem, and the interesting one gets abandoned. Score all twelve in one sitting, with your hour audit open.

**Multiply the four scores — don't add them.** Multiplying punishes a weak spot the way real life does: a daily, expensive problem trapped in software that can't connect is not your first build, however much it hurts. The highest product (out of 625) goes first.

### How often

1 = A FEW TIMES A YEAR • 5 = MANY TIMES  
A DAY

Rare problems feel painful in the moment but cost little over a year.

### Cost of a miss

1 = NOBODY NOTICES • 5 = A LOST  
CUSTOMER OR REAL MONEY

What happens when it's late, wrong or forgotten?

### Time each time

1 = UNDER A MINUTE • 5 = AN HOUR OR  
MORE

Count the whole thing — including the interruption to whatever else was happening.

### Ease to build

1 = NEEDS NEW SYSTEMS FIRST • 5 =  
CLEAR RULES, TOOLS ALREADY CONNECT

Can you describe it end to end in five minutes, and do your tools talk to each other?

## HOW TO FILL THIS IN

Print these pages and use a pen. Prefer to type? The interactive version at [promptolution.com/playbook](https://promptolution.com/playbook) multiplies and ranks for you.

1. For each workflow, circle one number from 1 to 5 in each of the four columns.
2. Multiply the four circled numbers and write the result under **Score** (the highest possible is 625).
3. Skip any workflow that doesn't apply to your business.
4. Write your three highest scores in **Your shortlist** below the table.

**Example:** quote follow-up scored How often 4, Time each time 2, Cost of a miss 4, Ease to build 5 →  $4 \times 2 \times 4 \times 5 = 160$ .

| WORKFLOW                                 | HOW OFTEN<br>CIRCLE ONE | TIME EACH<br>TIME<br>CIRCLE ONE | COST OF A<br>MISS<br>CIRCLE ONE | EASE TO<br>BUILD<br>CIRCLE ONE | SCORE |
|------------------------------------------|-------------------------|---------------------------------|---------------------------------|--------------------------------|-------|
| 01 Missed-call text-back                 | 1 2 3 4 5               | 1 2 3 4 5                       | 1 2 3 4 5                       | 1 2 3 4 5                      | _____ |
| 02 All your leads in one place           | 1 2 3 4 5               | 1 2 3 4 5                       | 1 2 3 4 5                       | 1 2 3 4 5                      | _____ |
| 03 Self-booking with screening questions | 1 2 3 4 5               | 1 2 3 4 5                       | 1 2 3 4 5                       | 1 2 3 4 5                      | _____ |
| 04 Reminders and rebooking               | 1 2 3 4 5               | 1 2 3 4 5                       | 1 2 3 4 5                       | 1 2 3 4 5                      | _____ |
| 05 Quote follow-up                       | 1 2 3 4 5               | 1 2 3 4 5                       | 1 2 3 4 5                       | 1 2 3 4 5                      | _____ |
| 06 Won-deal handoff                      | 1 2 3 4 5               | 1 2 3 4 5                       | 1 2 3 4 5                       | 1 2 3 4 5                      | _____ |
| 07 Document and receipt reading          | 1 2 3 4 5               | 1 2 3 4 5                       | 1 2 3 4 5                       | 1 2 3 4 5                      | _____ |
| 08 Status updates                        | 1 2 3 4 5               | 1 2 3 4 5                       | 1 2 3 4 5                       | 1 2 3 4 5                      | _____ |
| 09 Invoice follow-up                     | 1 2 3 4 5               | 1 2 3 4 5                       | 1 2 3 4 5                       | 1 2 3 4 5                      | _____ |
| 10 Review requests and check-ins         | 1 2 3 4 5               | 1 2 3 4 5                       | 1 2 3 4 5                       | 1 2 3 4 5                      | _____ |
| 11 Win-back and reorder reminders        | 1 2 3 4 5               | 1 2 3 4 5                       | 1 2 3 4 5                       | 1 2 3 4 5                      | _____ |
| 12 The Monday numbers email              | 1 2 3 4 5               | 1 2 3 4 5                       | 1 2 3 4 5                       | 1 2 3 4 5                      | _____ |
| Your own: _____                          | 1 2 3 4 5               | 1 2 3 4 5                       | 1 2 3 4 5                       | 1 2 3 4 5                      | _____ |
| Your own: _____                          | 1 2 3 4 5               | 1 2 3 4 5                       | 1 2 3 4 5                       | 1 2 3 4 5                      | _____ |

## YOUR SHORTLIST

1. \_\_\_\_\_ Score \_\_\_\_\_

2. \_\_\_\_\_ Score \_\_\_\_\_

3. \_\_\_\_\_ Score \_\_\_\_\_

Build the top one or two, run them for a month, then rescore. The list will have changed — fixing one workflow usually reveals the next one behind it.

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# 04

## THE PLAN

### Your 30-day plan

One workflow at a time. Whether you build it yourself or with a partner, this is the order that works.

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#### WEEK 1

#### Measure and choose

- ✓ Redo the hour audit with real numbers — your call log, sent folder and unpaid-invoice report.
  - ✓ Score all twelve workflows and commit to the top one.
  - ✓ Write today's process as numbered steps, including the odd cases someone handles by instinct.
  - ✓ Pick the one number that will prove it worked, and write down where it stands today.
- 

#### WEEK 2

#### Build the simple version

- ✓ Build the main path only. Send every unusual case to a person for now.
  - ✓ Use tools you already pay for before buying anything new.
  - ✓ Create every account in your business's name — never a personal or vendor account.
  - ✓ Test with ten real examples, checking each result before it reaches a customer.
-

## WEEK 3

### Run it with someone watching

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- ✓ Turn it on for real, with a person reviewing anything unusual.
  - ✓ Log every mistake and why it happened. That log is your list for version two.
  - ✓ Tell your team what it does and what to do if it misfires.
  - ✓ Fix the two most common problems. Leave the rest for now.
- 

## WEEK 4

### Prove it, then pick the next

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- ✓ Compare your number with week one.
  - ✓ Write a one-page guide: what starts it, what it does, who owns it, what to do if it breaks.
  - ✓ Decide: keep it, fix it or switch it off. Switching off is a fine — and cheap — answer.
  - ✓ Rescore your list and start the next build, or let this one settle for a month.
-

## The ownership checklist

Whoever builds it, you should end up owning it. Ask for every item below before you sign — and ask us, too. If a vendor gets uncomfortable at any item, that's your answer. A good build keeps running after the builder walks away.

Tick each box once you have that item in writing.

- 
- ☐ 01 **Every account is in your business's name, on your billing, with you as the main admin.**

If the vendor holds the logins, leaving them means starting over.

- 
- ☐ 02 **AI usage runs on your own account, paid directly to the provider.**

You see the real cost, and it keeps working if you change partners.

- 
- ☐ 03 **Each automation has a plain-English runbook.**

What starts it, what it does, where it can fail and who to call. A recorded video call doesn't count.

- 
- ☐ 04 **You have full admin access to every tool involved.**

Not a limited seat that needs someone else's permission to change anything.

- 
- ☐ 05 **You can pause or switch off any automation yourself.**

An off switch you can reach at 9 p.m. on a Friday matters.

- 
- ☐ 06 **Failures send an alert to someone on your team.**

Automations break quietly — a changed password or a renamed field can stop one for weeks.

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- ☐ 07 **You know how to export your data: what format, from where, by whom.**  
Agree it before there's data worth exporting.
- 

- ☐ 08 **Custom work is delivered somewhere your business controls.**  
Configuration and code should live in your accounts, readable by the next person.
- 

- ☐ 09 **It's written down who fixes what when an outside app changes — and what that costs.**  
Apps update constantly. Decide in advance, not during an outage.
- 

- ☐ 10 **You have the full tool list and the monthly total before the build starts.**  
Surprise subscriptions are the most common hidden cost in automation.
-

## Five ways this fails

Almost every failed automation project fails for one of these reasons. All five are avoidable.

### Automating a process nobody wrote down 01

If nobody can list the steps, the automation gets built around whoever talks loudest. The odd cases show up after launch, one at a time, and each one costs a little trust.

### Picking the exciting project over the expensive problem 02

The workflow that sounds fun is rarely the one losing money. Score first, then build. The dull one usually pays best.

### Letting AI make judgment calls 03

Automate the fetching, sorting, drafting and sending. Keep a person on pricing exceptions, legal or medical questions and anything that could damage an important relationship.

### Building for the business you might have someday 04

Extra capacity you don't need yet is complexity you have to maintain now. Build for today's volume and rebuild when growth actually arrives.

## No owner, no runbook, no alarm

05

Every automation needs a named owner, a one-page guide for when it breaks, and an alert when it stops running. Without them, failures go unnoticed for weeks.

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# 07

YOUR NEXT STEP

## Start with one

If you read this and build one workflow yourself, it did its job. None of the twelve is a secret — doing it well is the hard part, and you now have enough to start. If you'd like help, here's how it works with us:

- **Free:** the [AI readiness quiz](#) (2 minutes) and your [industry checklist](#) (5 minutes).
- **Free 30-minute call:** bring your shortlist. We'll check your scores and put real dollar figures on the top two. No pitch deck — if it isn't worth building, we'll say so.
- **Build with us:** projects start at \$3,000 and go live in about 30 days. AI costs stay yours, paid directly to the provider, and every account is in your name from day one.

Book a call at [promptolution.com/contact](https://promptolution.com/contact). Whatever you choose: own the accounts.