



The AI Automation Starter Pack

10 blueprints · 30 business prompts · readiness checklist · process-mapping worksheet

Future Intelligence Technology (FIT)
futureintelligencetech.com · info@futureintelligencetech.com

How to use this pack

Automation pays off when you automate the **right** task, in the **right** order. Use this pack in four steps:

1. **Map one process** with the worksheet at the back (about 20 minutes).
2. **Check readiness** with the 15-point checklist. Fix any "no" answers first.
3. **Pick a blueprint** that matches. Start with #1, #2 or #3. They're the quickest wins.
4. **Use the prompts** for the AI steps in your blueprint, or for everyday work right away.

The blueprints name common tools as examples. Most steps can be done in Make, Zapier, n8n, Microsoft Power Automate or with custom code. Use what you already pay for.

Want a personalised version? The free AI automation audit at futureintelligencetech.com/free-tools/ai-audit/ ranks these for your business in about four minutes.

Part 1: 10 automation blueprints

1. Instant lead response

Trigger: new enquiry (website form, WhatsApp, email, Facebook lead form).

Steps: save to one list (sheet/CRM) → send an instant, specific reply that answers the most common question and offers a booking link → notify the right person → if no booking in 24h, send one helpful follow-up.

Tools: form tool + Make/Zapier/n8n + email or WhatsApp Business Platform + Google Sheets or CRM.

Pitfall: generic "we'll be in touch" replies. Answer something real in the first message.

2. Appointment reminders with one-tap reschedule

Trigger: booking created in your calendar or booking tool.

Steps: confirmation immediately → reminder 48h before with Confirm / Reschedule links → final reminder morning-of → on cancellation, offer the slot to a waitlist → after a no-show, send a rebooking message.

Tools: booking tool (Cal.com, Calendly, practice software) + SMS/WhatsApp/email.

Pitfall: reminders on a channel customers don't read. Ask which they prefer.

3. Invoice creation and payment chasing

Trigger: job marked complete / order delivered / monthly date.

Steps: create invoice in accounting tool → send with payment link → reminder 3 days before due → on due date → 7 and 14 days after (firmer each time) → stop on payment → escalate to a person after 21 days.

Tools: QuickBooks/Xero/Zoho Books + Stripe/PayPal/Paystack + automation platform.

Pitfall: reminders that keep sending after payment. Always check status first.

4. FAQ assistant on your busiest channel

Trigger: customer message on website chat or WhatsApp.

Steps: AI answers only from your approved FAQ document → asks for contact details if a person is needed → hands over with the conversation attached → log unanswered questions weekly.

Tools: chatbot platform or custom assistant + your FAQ document + WhatsApp Business Platform.

Pitfall: letting the AI answer from general knowledge. Ground it in your own content.

5. Email/PDF to spreadsheet (data extraction)

Trigger: email arrives at a dedicated inbox (orders@, invoices@).

Steps: AI extracts fields (names, dates, amounts, reference) → validate (totals add up, required fields present) → add row/record → flag anything uncertain for review.

Tools: email + automation platform with an AI step + Google Sheets/Airtable/accounting tool.

Pitfall: no validation. Always add rules that catch obviously wrong values.

6. Weekly report that builds itself

Trigger: every Monday 7am.

Steps: pull last week's numbers from each tool → fill a report template → AI writes a 5-line summary of what changed → send to email or Slack.

Tools: automation platform + Google Sheets/Looker Studio + AI step.

Pitfall: too many metrics. Pick the 5–8 that drive decisions.

7. New client onboarding

Trigger: deal marked won / contract signed / first payment.

Steps: create client folder and project board → send welcome email with next steps → schedule kickoff → create CRM record and first invoice → checklist task for the human steps.

Tools: CRM + e-signature + Google Drive/SharePoint + project tool + automation platform.

Pitfall: automating before the steps are agreed. Write the checklist first.

8. Review requests and replies

Trigger: order delivered / service completed.

Steps: wait 2–3 days → request a review with a direct link → AI drafts replies to new reviews for approval → alert immediately on any review of 3 stars or fewer.

Tools: store/booking system + review platform + automation platform.

Pitfall: incentivising only positive reviews. That breaks most platforms' rules.

9. One-in, many-out content

Trigger: you publish an article or upload a voice note/video.

Steps: transcribe if needed → AI drafts LinkedIn posts, an Instagram caption, a newsletter section and a short-video script using your voice guide → human edits and approves → schedule.

Tools: transcription + AI step + scheduler (Buffer, Metricool) + approval board.

Pitfall: publishing unedited AI drafts. Always edit for accuracy and voice.

10. Internal knowledge assistant

Trigger: a team member asks a question in chat.

Steps: search your own SOPs, policies and templates → answer with a link to the source → say "not found" rather than guessing → log unanswered questions to improve docs.

Tools: retrieval-augmented generation (RAG) app or workspace AI search over your documents.

Pitfall: outdated documents. Assign an owner to keep sources current.

Part 2: 30 business prompts

Replace anything in [brackets]. For best results, paste an example of output you like and say "match this style".

Customer service

1. Reply to a difficult message

You are a calm, experienced customer service lead at [business]. Reply to this message. Acknowledge the problem in one sentence, explain what we will do and by when, and avoid blame or promises we can't keep. Message: ""[paste]""

2. Turn past messages into an FAQ

Here are [50] recent customer messages. Group them into the 10 most common questions, write a clear, short answer for each based only on the information I provide, and list any questions I need to answer myself. Messages: ""[paste]""

3. Write chatbot rules

I'm setting up an AI assistant for [business]. Write rules for: topics it may answer, topics it must hand to a person, how it should hand over, and how it should respond when unsure. Our sensitive areas are [refunds, medical, legal...].

4. Apology + fix email

Write a sincere apology email to a customer whose [order was late / appointment was missed]. Explain what happened in plain words, what we've changed so it won't recur, and offer [remedy]. Under 150 words.

5. Review reply

Write a reply to this [positive/negative] review for [business]. Thank them by name, reference something specific they said, and (if negative) invite them to contact [email] to resolve it. Under 80 words. Review: ""[paste]""

6. WhatsApp-style rewrite

Rewrite this message for WhatsApp: shorter sentences, friendly, one emoji at most, and a clear next step. Message: ""[paste]""

Marketing

7. Content ideas from customer questions

Here are questions our customers ask: ""[paste]"". Suggest 15 content ideas (blog, social, video) that answer them, each with a working title and the search intent it serves.

8. Repurpose an article

Turn this article into: 3 LinkedIn posts (hook first line), 1 Instagram carousel outline (8 slides), 1 newsletter paragraph and 1 60-second video script. Keep facts exactly as written. Article: ""[paste]""

9. Brand voice guide

Analyse these three pieces of our writing and produce a one-page voice guide: tone, sentence style, words we use, words we never use, and 5 before/after examples. Writing: ""[paste]""

10. Landing page critique

Act as a conversion copywriter. Review this landing page copy for clarity, specificity and a single clear call to action. List the 5 highest-impact changes with rewritten examples. Copy: ""[paste]""

11. Email subject lines

Write 10 subject lines for this email aimed at [audience]. Mix curiosity, benefit and plain-descriptive styles. No clickbait, no all-caps. Email: ""[paste]""

12. Local SEO description

Write a 750-character Google Business Profile description for [business] serving [area]. Include what we do, who for, and what makes us different, with no keyword stuffing.

Sales

13. Discovery call questions

I sell [service] to [customer type]. Write 12 discovery questions that uncover their real problem, budget, timeline and decision process, in a natural conversational order.

14. Follow-up after no reply

Write a short, friendly follow-up to a prospect who hasn't replied in [7] days after receiving our proposal for [project]. Add one new piece of value (an idea or resource). Under 90 words.

15. Objection handling

Our prospects often say "[objection]". Write 3 honest, non-pushy responses, each addressing the real concern behind the objection.

16. Proposal summary

Summarise this proposal into a one-page executive summary: the problem, our solution, outcomes, timeline, price and next step. Proposal: ""[paste]""

17. Lead qualification script

Write a short qualification flow (max 4 questions) for enquiries about [service] that identifies good-fit leads by [budget, location, timeline], plus polite responses for poor fits.

18. Case study draft

Turn these project notes into a case study: client problem, what we did, measured results (only those I provide), and a quote placeholder. Notes: ""[paste]""

Operations

19. Write an SOP

Turn this description of how we [process] into a step-by-step SOP a new hire could follow: purpose, when to use, numbered steps, common mistakes, who to ask. Description: ""[paste]""

20. Find automation opportunities

Here is how we handle [process] today: ""[steps]"". Identify which steps could be automated, which need human judgement, what tools could connect them, and the risks.

21. Meeting notes to actions

Turn these meeting notes into: a 3-sentence summary, decisions, action items (owner and due date) and open questions. Notes: ""[paste]""

22. Checklist from a policy

Turn this policy into a practical checklist staff can tick off. Flag anything ambiguous. Policy: ""[paste]""

23. Spreadsheet formula help

In [Google Sheets/Excel], I have [describe columns]. Write a formula that [goal], explain how it works, and how to adapt it.

24. Supplier comparison

Compare these supplier quotes in a table (price, terms, delivery, risks) and recommend one with reasons. Quotes: ""[paste]""

Admin, HR and finance

25. Job advert

Write a job advert for a [role] at [business]: responsibilities, must-haves vs nice-to-haves, pay [range], working pattern, how to apply. Use inclusive language.

26. Interview questions

Write 10 structured interview questions for a [role] that test [skills], with what a strong answer looks like for each.

27. Polite payment reminder

Write three payment reminder emails (friendly, firm, final) for invoice [number] of [amount] due [date]. Include the payment link placeholder.

28. Expense categorisation

Categorise these transactions into [categories] in a table and flag anything unusual. Transactions: ""[paste]""

29. Explain a document simply

Explain this [contract/letter/report] in plain English: what it says, what it asks of us, deadlines, and questions to ask a professional. This is not a substitute for legal advice. Document: ""[paste]""

30. Plan my week

Here are my tasks and deadlines: ""[paste]"". Build a realistic weekly plan, flag what to delegate or automate, and protect two blocks for focused work.

Part 3: Readiness checklist (15 points)

Before automating a task, you should be able to tick most of these. Each “no” is a small foundation to fix first.

- ☐ The task happens at least weekly.
- ☐ We can describe the steps in writing, in order.
- ☐ The same steps are followed by everyone who does it.
- ☐ The information it needs is digital (not only on paper or in someone’s head).
- ☐ The apps involved can connect (have an API or integrations with Make/Zapier/n8n).
- ☐ We know how long it takes today and how often it happens.
- ☐ We know what a mistake costs.
- ☐ One person owns the process and can make decisions about it.
- ☐ We know which steps need human judgement or approval.
- ☐ We know what data is personal or sensitive and where it’s allowed to go.
- ☐ We have consent for any marketing messages we plan to send.
- ☐ There is a clear “done” state (e.g. invoice paid, booking confirmed).
- ☐ Someone will be alerted if the automation fails.
- ☐ We’ve agreed how we’ll measure success after launch.
- ☐ We have a fallback if the automation is switched off.

Part 4: Process-mapping worksheet

Process name:

Trigger (what starts it):

#	Step	Who	App/tool	Minutes	Copy (C) / Decide (D)
1					
2					
3					

4					
5					
6					
7					
8					

How often per week: _____ **Total minutes each time:** _____ **Hours per month** (times × minutes ÷ 60 × 4.33): _____

Steps marked C are automation candidates. **Steps marked D** stay with a person, or AI drafts and a person approves.

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