

# What to Automate First in a Small Business (and What You Never Hand Over)

---

## The prompts

You are helping [BUSINESS NAME], a [INDUSTRY, e.g. plumbing / tour operator / kids' activity studio] business in [SUBURB OR CITY], work out what to automate first.

Here is how the business currently handles enquiries, follow-up, and admin:

ENQUIRIES: [Describe how a new customer currently reaches you: phone, website form, social DM, walk-in. Who answers, and how fast, on a normal day and on your busiest day.]

FOLLOW-UP: [Describe what happens after you send a quote or a price. Who chases it, after how long, and how often it actually happens versus how often it's supposed to.]

ADMIN: [Describe your invoicing, scheduling, and supplier communication. How much time per week it takes, and who does it.]

MONEY: Average job or booking value is \$[X]. In a normal week we estimate we miss or lose track of [NUMBER] enquiries that would likely have converted.

Using only the information above:

1. Calculate the estimated annual cost of missed enquiries (average value times missed enquiries per week times 52). Show the working.
2. Rank enquiries, follow-up, and admin in the order I should automate them, based on where the actual dollar loss is happening in THIS business, not a generic rule.
3. For the top-ranked item, describe in plain language what a first, narrow automation would do, and what it would explicitly NOT do (who still approves or sends anything).
4. Flag anything I described that should never be automated, and say why.

Keep the answer under 400 words. No jargon. Write it like you're explaining it over coffee, not presenting a slide deck.

You are helping me write a one page guardrail policy for [BUSINESS NAME] before we automate anything with AI.

The business: [one or two sentences: what you do, who your customers are, and what would genuinely go wrong if an AI got it wrong, e.g. "we run kids' birthday parties" or "we're an emergency plumber"].

Write a short, plain language list of rules for what an AI system is never allowed to do here without a person checking first. Cover at minimum:

1. Sending anything to a customer (email, SMS, chat reply) without a person reading it first.

2. Stating a price, a policy, a yes or no, or an availability answer that isn't written down somewhere as a confirmed fact.
3. Deciding what counts as an emergency, a safety issue, or a complaint that needs a person immediately.
4. Doing or claiming to do the actual service the business sells: the trade, the tour, the class, the care, the event.
5. Anything specific to THIS business that would be a genuine problem if an AI got it wrong (ask me if you're not sure, don't guess).

For each rule, add one sentence on what the system CAN do instead: usually flag it, draft it, or ask a person.

Output this as a numbered, one page policy I could print and stick above the desk. Plain English, no jargon, under 300 words total.

**File 1: automation-order-audit-prompt.txt** (the first prompt above, ready to paste into any AI assistant)

**File 2: never-automate-guardrail-prompt.txt** (the second prompt above)

**File 3: The Automation Order Checklist** (one page, print it)

#### THE AUTOMATION ORDER CHECKLIST

##### STEP 1: FIND THE LEAK

Average job or booking value: \$\_\_\_\_\_

Enquiries missed or slow-answered in a normal week: \_\_\_\_\_

Estimated annual cost (value x missed x 52): \$\_\_\_\_\_

##### STEP 2: FIX THE FRONT DOOR FIRST

☐ Every call, form, and DM lands somewhere a person sees within \_\_\_\_\_ minutes

☐ Nothing customer-facing gets missed overnight or on a busy day

☐ A system can draft a reply; a person still sends it

##### STEP 3: THEN FIX FOLLOW-UP

☐ Every quote gets a check-in within 3 to 5 days if the customer goes quiet

☐ Follow-up happens the same way every time, not "when someone remembers"

##### STEP 4: THEN, AND ONLY THEN, ADMIN

☐ Invoicing, scheduling, and supplier admin get a second look for time saved

☐ None of this happens before steps 1 to 3 are solid

##### STEP 5: THE NEVER-AUTOMATE LIST

☐ No system sends to a customer without a person reading it first

☐ No system states a price, policy, or yes/no it wasn't explicitly given

☐ No system decides what counts as an emergency

☐ No system does the actual work you sell

☐ Our own addition: \_\_\_\_\_

