

Process Pilot

Business Automation Playbook

Eight practical automation systems
for small and midsize businesses

EDITION 1

WELCOME

About this Playbook

Missed calls, forgotten follow-ups, and the same information typed twice quietly cost businesses time and money every week. This playbook walks through eight practical automation systems that small and midsize businesses can put to work. Each play shows the problem, how the automation works, the tools involved, a worked financial example, and a simple calculation you can run with your own numbers.

> **ON TOOLS**
>
> The tools listed are suggested options, not required purchases. Whenever possible, we build on the software you already use before introducing anything new.

Inside every play

01	**The problem**	What is going wrong, and who feels it.
02	**The automation solution**	The system that fixes it, in plain terms.
03	**Automation flow**	Five steps, each with suggested tools.
04	**Tools and implementation notes**	Practical guidance and safeguards.
05	**Financial projection**	A worked example with illustrative numbers.
06	**Your calculator**	A one-line calculation to run with your numbers.
07	**Success metrics**	How to tell whether the play is working.

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PLAY

01

Potential Customers Slip Away When Calls Go Unanswered

Lead capture | Revenue recovery | Best for service businesses

The problem

When business owners and their crews are out working, they cannot always answer incoming calls. Potential customers may hang up, call a competitor, or forget to try again. Even when the company returns the call later, the opportunity may already be gone.

This is especially common for landscapers, roofers, plumbers, HVAC companies, and other service businesses that spend much of the day in the field.

The automation solution

Build a system that responds to missed calls, captures the customer's needs, records the lead, and helps the business schedule an estimate.

Automation flow

01 **Customer calls the business**
Trigger when an incoming call is missed
TOOLS Phone system / Twilio

02 **Automatic text response**
Invite the customer to explain what they need
TOOLS Twilio SMS / CRM messaging

03 **Capture lead information**
Record contact details, service, and location
TOOLS CRM / Airtable

04 **Qualify and schedule**
Collect project details and offer an estimate appointment
TOOLS CRM workflow / scheduling tool

05 **Notify the owner**
Send the lead details and track follow-up
TOOLS CRM notification / email / SMS

Tools and implementation notes

- **Phone integration:** Confirm that the current phone provider exposes missed-call events or supports call forwarding and webhooks.
- **Messaging:** Send a prompt, relevant response with clear opt-out handling and applicable messaging consent safeguards.
- **CRM:** Store each lead with a source, timestamp, status, and follow-up owner.
- **Scheduling:** Offer appointment slots only if the business's availability is current.
- **Fallback:** Alert a human if the text fails, the customer asks a complex question, or the workflow cannot identify the lead.

Financial projection

Suppose a business misses 40 calls a month. If 50% represent qualified prospects, 30% of those prospects book estimates, 40% of estimates become jobs, and each additional job contributes $600 in gross profit:

Qualified prospects	40 × 50%	**20**
Estimates booked	20 × 30%	**6**
Additional jobs	6 × 40%	**2.4**
Potential gross profit recovered	2.4 × $600	**$1,440 / month**

These are illustrative assumptions. Actual results depend on the business's call volume, lead quality, conversion rates, and the number of opportunities that would otherwise have been lost.

Your calculator

THE MATH, IN PLAIN WORDS

Extra jobs won = Missed calls × Qualified % × Booked % × Win %

Monthly benefit = Extra jobs won × Profit per job − System cost

Count only jobs you would not have won otherwise. Hours saved are extra capacity, not cash, unless paid hours actually go down.

Success metrics

Missed calls responded to | Qualified leads captured | Estimates booked | Additional jobs won | Gross profit recovered

PLAY

02 Estimates Go Out but Customers Never Hear Back

Sales follow-up | Conversion improvement

The problem

A business spends time inspecting properties, preparing estimates, and sending proposals. Then the customer goes quiet.

The owner gets busy with other jobs and forgets to follow up. Some customers need clarification, others are comparing competitors, and some simply need a reminder.

The result is a sales pipeline filled with opportunities that never receive consistent follow-up.

The automation solution

Create a follow-up workflow that tracks every estimate, sends appropriately timed reminders, records customer responses, and alerts the owner when a personal conversation is needed.

Automation flow

01 **Estimate sent**
Capture the estimate amount, customer, and sent date.
TOOLS Existing estimating software / CRM

02 **Create follow-up schedule**
Schedule reminders based on the estimate status and business rules.
TOOLS CRM workflow / Make

03 **Send customer follow-up**
Send a helpful message asking whether the customer has questions.
TOOLS Email / SMS provider

04 **Check customer response**
Stop reminders if the customer responds, declines, or accepts.
TOOLS CRM / messaging integration

05 **Alert owner and update pipeline**
Escalate interested or stalled prospects for personal follow-up.
TOOLS CRM task / notification

Tools and implementation notes

- Use Jobber, Housecall Pro, HubSpot, or your existing estimating platform where practical.
- Use Make or Zapier only if the required trigger and actions are not already available natively.
- Define clear stop conditions: accepted, declined, opted out, expired, or already contacted by an employee.
- Do not automatically change pricing or negotiate a proposal unless the owner has explicitly approved those rules.

Financial projection

Assume a business sends 60 estimates monthly, with an average gross profit of $500 per completed job. If 20% of estimates are currently lost because of inadequate follow-up, and the new system recovers 15% of that lost group:

Potentially lost estimates	60 × 20%	**12**
Estimates recovered	12 × 15%	**1.8**
Additional gross profit	1.8 × $500	**$900 / month**

This assumes the recovered estimates convert into completed jobs and that the improvement is incremental.

Your calculator

THE MATH, IN PLAIN WORDS

Extra profit = Estimates sent × % lost × % recovered × Profit per job

For net benefit, subtract your software and operating costs.

Success metrics

Follow-up completion rate | Customer response rate | Estimate-to-job conversion rate | Time to close | Additional gross profit

PLAY

03 Employees Waste Hours Entering the Same Information Twice

Data automation | Workflow integration

The problem

Employees enter customer information into multiple systems, copy details between spreadsheets, retype information from forms, and manually create documents. The same work gets repeated, mistakes creep in, and employees spend less time serving customers.

The automation solution

Connect the systems that hold the same business information. Capture data once, validate it, and automatically pass it to the other tools that need it.

Automation flow

01 **Customer submits information**
Capture information in a structured format.
TOOLS Website form / Jotform / Typeform

02 **Validate and standardize data**
Check required fields, formats, and duplicates.
TOOLS Make / Zapier / custom Python script

03 **Update connected systems**
Create or update the appropriate records.
TOOLS CRM API / accounting API / database

04 **Generate documents and notifications**
Populate templates and notify responsible employees.
TOOLS Google Docs / Microsoft 365 / email

05 **Log the result**
Record successful processing and flag exceptions.
TOOLS CRM / database / error log

Tools and implementation notes

- **Simple workflows:** Native integrations, Make, or Zapier.
- **Complex transformations:** Python, C#, or a small integration service.
- **Structured records:** The existing CRM or database should remain the authoritative source for each type of data.
- **Controls:** Add duplicate detection, required-field validation, retry handling, and an exception queue for failed records.

Financial projection

Suppose three employees each spend 30 minutes a day re-entering data, across 22 working days per month. The system eliminates 70% of that work, and loaded labor costs $25 per hour.

Current monthly effort	3 × 0.5 × 22	**33 hours**
Hours recovered	33 × 70%	**23.1 hours**
Monthly labor capacity value	23.1 × $25	**$577.50**

This represents productive capacity recovered. It becomes a direct cash saving only if the business reduces paid hours, avoids additional hiring, or otherwise realizes a financial benefit.

Your calculator

THE MATH, IN PLAIN WORDS

Hours recovered = People × Minutes a day × Days a month × % automated ÷ 60

Value of time = Hours recovered × Hourly cost

Success metrics

Time per record | Duplicate rate | Data error rate | Failed transactions | Employee hours recovered

PLAY

04 Customers Forget to Pay Their Invoices

Accounts receivable | Cash flow

The problem

Invoices are sent, but customers forget to pay. Employees manually check aging reports, write reminder emails, and track promises to pay. Some overdue invoices receive attention too late, while others are overlooked entirely.

The result is unnecessary administrative work and slower collection of money already earned.

The automation solution

Build an accounts receivable workflow that monitors invoice status, sends reminders based on due dates, escalates overdue balances, and keeps payment records synchronized.

Automation flow

01 **Invoice is created**
Retrieve invoice number, balance, due date, and customer.
TOOLS QuickBooks / Xero / accounting system

02 **Monitor due dates and payment status**
Identify upcoming and overdue invoices.
TOOLS Native accounting automation / scheduled API check

03 **Send payment reminders**
Send polite reminders with a payment link or instructions.
TOOLS Accounting email / approved SMS provider

04 **Escalate overdue balances**
Notify staff when a balance crosses an agreed threshold.
TOOLS CRM task / email / internal notification

05 **Reconcile and close the workflow**
Stop reminders when payment clears and record the outcome.
TOOLS Accounting system / payment processor

Tools and implementation notes

- Use native QuickBooks or Xero reminders if they satisfy the requirements.
- Integrate a CRM or workflow platform only when additional routing or reporting is needed.
- Stop reminders immediately when an invoice is paid, disputed, credited, or under an agreed payment arrangement.
- Keep sensitive payment details inside approved payment and accounting systems. Never store card details in an ordinary spreadsheet or workflow log.
- Require human review for disputes, unusual balances, and sensitive customer relationships.

Financial projection

Assume a business processes 100 invoices monthly. Automating reminders saves four minutes per invoice, and loaded administrative labor costs $25 per hour.

Time saved	100 × 4 ÷ 60	**6.67 hours**
Labor capacity value	6.67 × $25	**about $167 / month**

If the business also reduces its average collection period, it may improve working capital. That is a separate benefit from labor savings and should be measured using actual collection data.

Your calculator

THE MATH, IN PLAIN WORDS

Hours saved = Invoices × Minutes saved ÷ 60

Value of time = Hours saved × Hourly cost

Faster payment is a separate benefit. Measure it with your actual collection data rather than counting it as profit.

Success metrics

Reminder coverage | Overdue balance | Average days to payment | Administrative time | Dispute rate

PLAY

05 Appointments Get Missed or Forgotten

Scheduling | Customer experience

The problem

Customers forget appointments, fail to confirm, or need to reschedule at the last minute. Employees spend time making reminder calls, and vacant appointment slots can go unfilled.

For businesses that rely on inspections, consultations, estimates, or scheduled service visits, this creates wasted capacity and lost contribution margin.

The automation solution

Automate booking confirmations, appointment reminders, rescheduling links, and notifications when a customer cancels or fails to confirm.

Automation flow

01 **Appointment is booked**
Create a record with time, location, service, and contact.
TOOLS Calendly / Google Calendar / Jobber

02 **Send booking confirmation**
Confirm the appointment and share relevant details.
TOOLS Calendar / email / SMS integration

03 **Send scheduled reminders**
Send reminders at configured intervals before the appointment.
TOOLS Native scheduler / CRM workflow

04 **Handle confirmation or rescheduling**
Update the calendar and notify the appropriate staff member.
TOOLS Scheduling platform / customer link

05 **Track attendance and fill openings**
Record attendance and offer newly available slots to eligible customers.
TOOLS CRM / scheduling dashboard

Tools and implementation notes

- Prefer the existing booking system's reminder functionality before adding a separate workflow platform.
- Make time zones, travel time, appointment duration, and staff availability explicit.
- Prevent double-booking by checking live availability before confirming a rescheduled slot.
- Send cancellation notifications quickly enough for staff to adjust their schedules.

Financial projection

Assume a business schedules 120 appointments a month, has a 10% no-show rate, and reduces that rate to 6% after implementing reminders. Each recovered appointment contributes $90.

Current no-shows	120 × 10%	**12**
No-shows after automation	120 × 6%	**7.2**
Recovered appointments	12 - 7.2	**4.8**
Potential additional contribution	4.8 × $90	**$432 / month**

This assumes the recovered appointments are completed and would otherwise have been lost.

Your calculator

THE MATH, IN PLAIN WORDS

Extra appointments kept = Appointments × (Old no-show % - New no-show %)

Extra profit = Extra appointments kept × Profit per appointment

Success metrics

No-show rate · Cancellation rate · Rescheduling completion · Recovered appointment slots · Contribution per appointment

PLAY

06 You Run Out of Supplies at the Worst Time

Inventory management | Purchasing

The problem

A business runs out of commonly used supplies, makes emergency trips to the store, pays rush delivery fees, or purchases excess inventory because nobody has an accurate view of stock levels.

This can delay jobs, increase operating costs, and tie up cash in materials that sit unused.

The automation solution

Create an inventory monitoring system that tracks stock, flags items approaching reorder thresholds, prepares purchase requests, and notifies the responsible person before a shortage disrupts operations.

Automation flow

01 **Inventory is updated**
Record purchases, usage, returns, and adjustments.
TOOLS POS / inventory software / mobile form

02 **Check reorder thresholds**
Compare available stock with reorder points.
TOOLS Inventory platform / database / script

03 **Generate purchase request**
Prepare the item, quantity, supplier, and estimated cost.
TOOLS Make / Zapier / inventory workflow

04 **Obtain approval**
Route requests according to spending limits.
TOOLS Email / Teams / approval workflow

05 **Place order and reconcile**
An authorized employee orders the goods and confirms receipt.
TOOLS Supplier portal / purchasing system

Tools and implementation notes

- Use existing inventory software when it supports reorder points and purchasing workflows.
- Use Airtable or a structured database for simpler inventories with limited SKU counts.
- Include supplier lead times, minimum order quantities, seasonal demand, and stock already on order.
- Require human approval before placing orders, particularly for high-value or unusual purchases.
- Do not assume an inventory count is accurate unless actual usage and receipts are being recorded reliably.

Financial projection

Assume a business experiences $500 per month in rush delivery fees and avoidable emergency purchasing costs. Better stock visibility is expected to reduce these costs by 40%.

Current avoidable costs		**$500 / month**
Estimated reduction		**40%**
Potential monthly savings	$500 × 40%	**$200**

This excludes any separately verified benefit from preventing job delays or reducing excess inventory.

Your calculator

THE MATH, IN PLAIN WORDS

Monthly savings = Rush and emergency costs × % eliminated

For a fuller picture, add verified savings from fewer stockouts and less excess inventory, then subtract software costs.

Success metrics

Stockout frequency | Rush purchasing costs | Inventory accuracy | Obsolete inventory | Purchase-order turnaround time

PLAY

07 Happy Customers Leave Without Writing Reviews

Reputation management | Marketing operations

The problem

A business completes quality work, but most satisfied customers never leave a review. The owner relies on memory to ask for feedback, so requests are inconsistent. Negative experiences may also go unnoticed until they become public complaints.

A systematic process can make review requests more consistent and help the business address customer issues sooner.

The automation solution

Trigger a review invitation after a completed job, monitor responses, notify staff when a customer needs help, and track the number of review requests and reviews received.

Automation flow

01 **Job is marked complete**
Use the completion event as the trigger.
TOOLS Jobber / Housecall Pro / CRM

02 **Send review invitation**
Invite the customer to leave an honest review on a chosen public platform.
TOOLS CRM messaging / email / SMS

03 **Monitor customer feedback**
Capture available review and response data.
TOOLS Review platform / approved integration

04 **Route service issues**
Notify the owner to address unresolved customer concerns.
TOOLS CRM task / internal notification

05 **Measure reputation performance**
Track requests, review conversion, ratings, and response times.
TOOLS Spreadsheet / CRM dashboard

Tools and implementation notes

- Use the CRM's existing review request feature or an approved reputation management platform.
- Send requests consistently to eligible customers, rather than selectively soliciting only positive reviews.
- Never buy reviews, fabricate customer experiences, or offer incentives in exchange for positive ratings.
- Respect the chosen review platform's policies and applicable messaging requirements.
- Use review counts and conversion rates as direct performance measures. Treat future sales attributed to improved reputation as a separate estimate.

Financial projection

Assume a business completes 80 jobs per month and currently receives reviews from 5% of customers. A new workflow increases that rate to 15%.

Current reviews	80 × 5%	**4**
Reviews after automation	80 × 15%	**12**
Additional reviews	12 - 4	**8 / month**

This is a measurable reputation outcome, not a direct dollar saving. To estimate a possible financial return, the owner would need evidence that additional reviews improve lead volume or conversion.

Your calculator

THE MATH, IN PLAIN WORDS

Extra reviews = Completed jobs × (New review % − Old review %)

Optional: to estimate revenue impact, multiply qualified leads by the increase in your win rate and by profit per job. Use this only if you can support the assumed improvement.

Success metrics

Review request coverage | Review conversion rate | Average rating | Response time to complaints | Qualified lead conversion

PLAY

08 You Don’t Know Which Parts of Your Business Make Money

Reporting automation | Business intelligence

The problem

Business information is scattered across accounting software, spreadsheets, scheduling systems, and customer databases. Preparing a weekly or monthly report requires manual exports and calculations.

As a result, owners may not know which services are most profitable, where costs are rising, or whether sales growth is actually improving margins.

The automation solution

Build a reporting pipeline that collects data from approved sources, standardizes the records, calculates agreed business metrics, and delivers a dashboard or scheduled management report.

Automation flow

01 **Connect business data sources**
Identify authoritative sources for sales, expenses, jobs, and customers.
TOOLS QuickBooks / CRM / scheduling / spreadsheets

02 **Extract and validate records**
Collect data and flag missing or inconsistent records.
TOOLS Native connectors / Make / API scripts

03 **Combine and calculate metrics**
Standardize dates, categories, costs, and reporting definitions.
TOOLS SQL / Python / spreadsheet formulas

04 **Publish the dashboard**
Show revenue, gross margin, lead conversion, and operational KPIs.
TOOLS Power BI / Looker Studio / Excel

05 **Deliver scheduled insights**
Send reports and flag significant changes for review.
TOOLS Dashboard subscriptions / email / Teams

Tools and implementation notes

- Start with a spreadsheet or built-in accounting dashboard if that meets the need.
- Use SQL and a reporting layer when data spans multiple systems or requires repeatable transformations.
- Use Power BI, Looker Studio, or another appropriate visualization tool to present metrics.
- Define each metric precisely. For example, distinguish invoiced revenue from collected revenue and gross profit from net income.
- Restrict access to sensitive financial data and make the refresh time visible.
- Do not present an automated dashboard as accurate until reconciled against source systems.

Financial projection

Suppose an owner and an administrator each spend three hours per month preparing reports. Automation reduces that effort by 75%, and their loaded labor cost is $35 per hour.

Current reporting effort	2 × 3	**6 hours / month**
Hours recovered	6 × 75%	**4.5 hours**
Monthly labor capacity value	4.5 × $35	**$157.50**

The dashboard may also support better business decisions, but that upside should not be counted as guaranteed savings. Measure specific decisions and financial results separately.

Your calculator

THE MATH, IN PLAIN WORDS

Hours saved = People × Hours a month × % automated

Value of time = Hours saved × Hourly cost

Enter percentages as decimals (75% = 0.75).

Success metrics

Report preparation time | Data accuracy | Refresh reliability | Time to identify issues | Documented business improvements

WORKING TOGETHER

How We Work With You

Every engagement follows the same four steps: identify the problem, quantify its impact, map the workflow, and propose a solution.

1 **Identify the problem**

2 **Quantify its impact**

3 **Map the workflow**

4 **Propose a solution**

The eight plays at a glance

PLAY	PRIMARY VALUE	FIRST METRIC WE TRACK
1. Missed calls	Revenue recovery	Additional jobs won
2. Estimate follow-up	Sales conversion	Estimate win rate
3. Duplicate data entry	Labor capacity	Hours per record
4. Invoice reminders	Cash flow and admin time	Days to payment
5. Appointment reminders	Recovered capacity	No-show rate
6. Inventory monitoring	Cost avoidance	Rush purchasing costs
7. Review requests	Reputation growth	Review conversion rate
8. Automated reporting	Management efficiency	Reporting hours

Our implementation standard

On every engagement, we document:

01 **Baseline** We measure your current process before building anything.	02 **Target** We define the business outcome and a measurable success threshold.
03 **Design** We map the workflow, tools, data, and human approval points.	04 **Build** We configure integrations, automation logic, and exception handling.
05 **Validate** We test normal cases, failures, duplicates, and unusual inputs.	06 **Measure** We compare actual results against your baseline after launch.

A NOTE ON THE NUMBERS

The financial projections in this playbook are estimates, not guarantees. We show our assumptions openly, keep additional profit separate from labor capacity and cash savings, and subtract ongoing costs before presenting any net benefit.

YOUR NEXT STEP

Book an Automation Opportunity Review

with Process Pilot.

How we will work together:

- Identify the problem
- Quantify its impact
- Map the workflow
- Propose a solution

Process Pilot