



FREE PLAYBOOK

The AI Automation Starter Playbook

The practical, no-hype guide to reclaiming hours and revenue with AI, find your leaks, automate the right things first, and build one connected system that compounds.

For founders & operators who want results

START HERE

You don't have an AI problem. You have a leakage problem.

Hours lost to repetitive work. Leads that go cold. Numbers scattered across a dozen tools. AI and automation are simply the fastest way to fix those leaks, if you start in the right place.

Most teams do the opposite. They buy a shiny tool, bolt it on somewhere random, see little change, and conclude "AI doesn't work for us." The tool was never the problem. The **sequence** was.

This playbook gives you that sequence. In the next few pages you'll learn how to find your most expensive leaks, the twelve automations that pay back first, and a simple 30-day plan to get moving, without a risky rip-and-replace.

Who this is for: founders, operators and growth leads at businesses doing real revenue who feel their team's time (and pipeline) leaking away, and want a clear, honest place to start.

Prefer the 60-second version?

Take our free AI Readiness Scorecard at drbrandify.com/ai-readiness for an instant read on where you stand.

STEP 1

Find the leak before you pick a tool

Spend one focused afternoon mapping where your week actually goes. You're looking for three patterns, and together they become your automation roadmap, ranked by pain.

1 Work that repeats

Copy-paste between apps, manual data entry, chasing updates, sending the same message again and again. If a person does it more than a few times a week, it's a candidate.

2 Moments where things slip

A lead that waited hours for a reply. An invoice that never went out. A follow-up everyone assumed someone else sent. These gaps quietly cost the most.

3 Questions you answer the same way

The support and sales questions your team answers identically every time. Anything with a repeatable answer can be handled, or drafted, by AI.

Rank them by cost, not by how easy they are to automate. The goal is to close your most expensive leak first, so the very first automation pays for the rest.

The 12 highest-ROI automations

Across most businesses, the biggest wins cluster in the same places. Here are twelve that consistently pay back, pick the ones that match your leaks.

1. Instant lead response

Reply to every new enquiry in seconds, 24/7, and qualify it.

7. Invoicing & payment chasing

Auto-issue invoices and follow up until they're paid.

2. Automated follow-up

Nurture sequences that chase every lead until they book.

8. Data sync across tools

Your apps kept in lockstep, no more copy-paste between systems.

3. Lead routing & enrichment

Score, enrich and send each lead to the right person or path.

9. Live KPI dashboard

Pipeline, spend and results in one always-current view.

4. AI support agent

Answer common questions from your own content, escalate the rest.

10. AI content drafting

First drafts of replies, posts and proposals in your voice.

5. Booking & reminders

Self-serve scheduling with automatic confirmations and no-show nudges.

11. Review & referral asks

Automatically request reviews and referrals at the right moment.

6. Onboarding sequences

Every new client or customer guided through the same great start.

12. Win-back & retention

Spot churn risk and upsell moments, then act on them.

STEP 3

Build one system, not ten experiments

The teams that win don't launch ten disconnected tools. They build one connected system, in order, so each automation feeds the next and the data is already flowing.

Start with the leak that costs the most. Prove it works. Then connect the next piece: leads flow into follow-up, follow-up into your CRM, your CRM into a dashboard. Each step compounds. Ten clever point-solutions that don't talk to each other just create new copy-paste.

YOUR 30-DAY STARTER PLAN

- **Week 1, Map.** Do the three-list audit. Pick the single most expensive leak.
- **Week 2, Build one.** Automate that one thing end to end (most start with instant lead response or follow-up).
- **Week 3, Connect.** Wire it into your CRM so nothing lives in a silo.
- **Week 4, Measure & expand.** Put the result on a simple dashboard, then start the next automation.

PRINCIPLE

Where AI belongs (and where it doesn't)

Use AI for the judgement-light, high-volume work. Keep humans on the moments that define the relationship.

GIVE TO AI

- Drafting the first reply
- Qualifying & enriching leads
- Answering repeat questions
- Summarising what changed

KEEP WITH PEOPLE

- The real sales conversation
- Strategy & judgement calls
- High-stakes relationships
- Anything that needs taste

The goal was never to remove people. It's to stop spending them on work only a machine should be doing, so your team's time goes where it actually grows the business.



YOUR NEXT STEP

Want to see the exact system for **your** business?

You don't need a six-month transformation, just the one right first move. Here's how to find it:

Take the free scorecard

Get your AI readiness score and top 3 moves in 60 seconds.

drbrandify.com/ai-readiness

Or book a free growth audit

We'll map the highest-ROI automation for your business, no obligation.

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