

A focused 2 to 4 week implementation sprint that maps one business workflow, builds one to three useful automations, and trains the team to use them.

Best Fit

- Owner-led or operator-led businesses
- Leads, customers, forms, CRM, email, calendars, or spreadsheets already in motion
- Manual follow-up, unclear handoffs, or disconnected reporting

Outcomes

- Faster lead follow-up
- Cleaner CRM tasks and handoffs
- Better weekly visibility
- One to three scoped automations or AI-assisted workflows
- Training and next-step backlog

Included Work

- Workflow map and opportunity prioritization
- Current-tool review
- Automation or AI workflow build
- Testing and human-review checks
- Launch support and training guide

Example Builds

- Website lead to CRM contact, task, and booking follow-up
- Weekly KPI summary from CRM or spreadsheet data
- Sales call recap into next-step tasks
- Internal intake assistant for requests

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