

AI AUTOMATION FOR SMALL BUSINESSES

# A Plain English Guide

How Oregon small business owners are saving 10+ hours per week with simple AI automation — no coding required.

This guide cuts through the hype and gives you a practical, jargon-free roadmap for using AI automation in your small business. Whether you're a plumber in Portland, a salon owner in Salem, or a consultant in Eugene — this is for you.

## CHAPTER 1

### What AI Automation Actually Means

AI automation means using software to handle repetitive tasks automatically — and using AI to make those automations smarter and more personalized. It's not robots replacing your team. It's software that handles the busywork so you can focus on the actual work.

A simple example: instead of manually sending a follow-up email to every new lead, an automation does it for you — personalized with their name, what they asked about, and a link to book a call. It happens in seconds, at midnight, while you sleep.

## CHAPTER 2

### The 5 Tasks Every Business Should Automate First

Start with the tasks that eat the most time and require the least judgment:

→ **Lead follow-up**

Auto-send a personalized reply within 5 minutes of a new inquiry. Most leads go cold within an hour.

→ **Appointment reminders**

Send SMS and email reminders 48hrs and 2hrs before appointments. Reduces no-shows by 40–60%.

→ **Review requests**

After a job is done, auto-send a request for a Google review. Timing matters — within 24 hours is best.

- Invoice reminders  
Send payment reminders 7 days, 3 days, and 1 day before due dates automatically.
- Social media posts  
Schedule a week of posts in 30 minutes using AI-generated content based on your services.

### CHAPTER 3

## Tools That Work for Small Budgets

You don't need enterprise software. These tools are affordable and effective for most service businesses:

- Zapier (\$20–\$49/mo)  
Connect your existing apps. Best for simple automations between tools you already use.
- Make / Integromat (\$9+)  
More powerful than Zapier for complex automations. Steeper learning curve but more flexible.
- Go High Level (\$97+/mo)  
All-in-one CRM + automation built for service businesses. Overkill for very small ops.
- Notion AI (\$10/mo)  
For automating content creation, SOPs, and internal documentation.
- ChatGPT API (\$0.01+)  
For AI-powered responses, content generation, and data summarization at low cost.

### CHAPTER 4

## Real Examples from Service Businesses

These are based on real businesses Francisco Labs has worked with across Oregon:

- Portland Plumber  
Saved 8 hrs/week by automating lead follow-up texts and appointment confirmations via Zapier + Calendly.
- Salem Hair Salon  
Reduced no-shows by 62% with automated SMS reminders sent 48hrs and 2hrs before appointments.
- Eugene Consultant  
Closed deals 3× faster by automating a 5-email nurture sequence triggered after each discovery call.
- Bend Landscaper  
Added \$2,400/month in repeat business by automating a seasonal check-in email to past clients.

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→ **Portland Yoga Studio**

Grew Google reviews from 12 to 87 in 4 months by automating review requests post-class.

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## CHAPTER 5

# How to Get Started in 30 Days

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A simple 4-week plan to implement your first automations:

→ **Week 1: Audit**

List every repetitive task you or your team does daily/weekly. Rank by time cost.

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→ **Week 2: Pick One**

Choose ONE automation to implement first (lead follow-up is usually the highest ROI).

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→ **Week 3: Build & Test**

Set up the automation using Zapier or Make. Test with 5 real scenarios before going live.

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→ **Week 4: Measure**

Track time saved, response rates, and no-show rates. Refine, then add your second automation.

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## CHAPTER 6

# When to Hire Help vs. DIY

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Honest guidance on what you can do yourself and what's worth outsourcing:

→ **DIY (easy)**

Simple Zapier connections, social media scheduling, email sequences in tools like Mailchimp.

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→ **DIY (medium)**

Make/Integromat workflows, basic CRM setup, ChatGPT API integrations with some documentation.

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→ **Hire help**

Custom CRM builds, multi-step AI workflows, integrations with industry-specific software.

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→ **Definitely hire help**

Custom-coded automation systems, AI chatbots, complex data pipelines, enterprise integrations.

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## TIME SAVINGS CALCULATOR

## How Much Time Could You Reclaim?

Task	Time/Week	Automatable?	Est. Savings
Lead follow-up emails & texts	5 hrs	<input type="checkbox"/> Yes	~4 hrs
Appointment reminders	3 hrs	<input type="checkbox"/> Yes	~2.5 hrs
Review request messages	2 hrs	<input type="checkbox"/> Yes	~1.5 hrs
Social media posting	3 hrs	<input type="checkbox"/> Yes	~2 hrs
Invoice & payment reminders	2 hrs	<input type="checkbox"/> Yes	~1.5 hrs
New client onboarding docs	2 hrs	<input type="checkbox"/> Yes	~1.5 hrs
Reporting & analytics	2 hrs	<input type="checkbox"/> Partial	~1 hr
Complex strategy decisions	—	<input type="checkbox"/> No	Needs you
<b>TOTAL POTENTIAL SAVINGS</b>	<b>19 hrs</b>		<b>~14 hrs</b>

## YOUR 30-DAY ACTION PLAN

## Start Here — One Step at a Time

- Day 1–3: List every repetitive task you handle weekly
- Day 4–5: Rank tasks by time cost and identify top 3 to automate
- Day 6–7: Sign up for Zapier (free tier) and explore templates
- Day 8–10: Build your first automation: lead follow-up email/text
- Day 11–14: Test with 10 real scenarios, refine, go live
- Day 15–17: Track open rates, response rates, time saved
- Day 18–21: Build automation #2: appointment reminders
- Day 22–25: Build automation #3: review request sequence
- Day 26–28: Audit all 3 automations for errors or edge cases
- Day 29–30: Plan your next 3 automations for the following month

Francisco Labs builds custom AI automation systems for Oregon  
hello@francicolabs.com · francicolabs.com/ai-automation-oreg

Francisco Labs · Portland, Oregon · francicolabs.com · hello@francicolabs.com