

# AI Suite — Automation Blueprint Pack

100 ready-made AI automation templates for UK small businesses.

Copy-paste workflows. Step-by-step instructions. Battle-tested.

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## 1. Email & Follow-Up Blueprints (20)

### B01 — Inbox Zero Morning Sort

**\*\*Goal:\*\*** Wake up to a sorted inbox.

**\*\*Steps:\*\***

1. Connect email to your AI agent (Gmail/Outlook).
2. Give it one instruction: sort every email into Needs Reply / Info / Spam / Urgent.
3. It drafts replies in your voice for the Needs Reply pile.
4. You review and send with one click.

**\*\*Prompt:\*\*** "Every morning at 7am, read my inbox. Categorise each email: URGENT (needs action today), REPLY (needs a response), INFO (just reading), SPAM (archive). For REPLY, draft a reply in my writing style. Summarise everything in 5 lines."

**\*\*Time saved:\*\*** 2-3 hours/day.

### B02 — Auto Follow-Up On Non-Responders

**\*\*Goal:\*\*** Recover "dead" quotes and unanswered emails.

**\*\*Steps:\*\***

1. Track sent emails/quotes in a spreadsheet.
2. Agent checks daily for non-responders after 3 days.
3. Sends a polite nudge: "Just checking you saw my last message..."
4. Second nudge at day 7, third at day 14 (then stops).

**\*\*Prompt:\*\*** "Every day, check my sent folder and quote tracker. Anyone who hasn't replied in 3 days gets a polite follow-up. Day 7: second nudge. Day 14: final nudge with a soft close."

**\*\*Time saved:\*\*** 1-2 hours/day. **\*\*Recovery:\*\*** 10-20% of "dead" leads.

### B03 — Cold Outreach Sequence

**\*\*Goal:\*\*** Automated 5-touch outreach.

**\*\*Steps:\*\***

1. Load prospect list (name, company, email).
2. Day 0: intro email. Day 3: value-add. Day 7: case study. Day 14: soft close. Day 21: last chance.
3. Personalise each touch with the prospect's industry.

**\*\*Time saved:\*\*** 3-4 hours/day.

## **B04 — Invoice Chaser**

**\*\*Goal:\*\*** Get paid without awkwardness.

**\*\*Steps:\*\***

1. Connect invoicing tool.
2. Day 0 after due date: gentle reminder.
3. Day 7: firmer nudge with payment link.
4. Day 14: final notice + offer to split payment.

**\*\*Prompt:\*\*** "Check my unpaid invoices daily. Day 0 overdue: polite reminder. Day 7: nudge with link. Day 14: final notice offering payment plans."

## **B05 — Meeting Scheduler**

**\*\*Goal:\*\*** Book meetings without back-and-forth.

**\*\*Steps:\*\***

1. Share your calendar link.
2. Agent confirms, reschedules, sends reminders.
3. No-shows get an automatic reschedule ask.

## **B06 — Newsletter Builder**

**\*\*Goal:\*\*** Monthly newsletter from your content.

**\*\*Steps:\*\***

1. Agent collects your week's best content.
2. Builds a 5-section newsletter (win, lesson, tip, link, CTA).
3. Sends on schedule.

## **B07 — Thank-You Automator**

**\*\*Goal:\*\*** Every new customer gets a thank-you within 24h.

**\*\*Steps:\*\***

1. Watch for new customer records.
2. Send personalised thank-you + what-happens-next.
3. Ask for a review at day 7.

## **B08 — Review Request Engine**

**\*\*Goal:\*\*** Turn finished jobs into reviews.

**\*\*Steps:\*\***

1. When a job is marked complete, start the sequence.
2. Day 1: "Hope you're happy with the work!"

3. Day 3: review request with direct link.

4. Day 10: follow-up if no review.

**\*\*Prompt:\*\*** "When a job closes, send a satisfaction check at day 1, review request at day 3, nudge at day 10."

## **B09 — Client Onboarding Pack**

**\*\*Goal:\*\*** New clients get everything automatically.

**\*\*Steps:\*\***

1. Welcome email with what to expect.
2. Questionnaire, terms, next steps.
3. Calendar invite for kickoff call.

## **B10 — Weekly Summary Report**

**\*\*Goal:\*\*** Know your numbers every Friday.

**\*\*Steps:\*\***

1. Agent gathers: leads, sales, emails sent, tasks done.
2. Sends a 10-line Friday summary.
3. Flags anything needing attention.

## **B11 — Email List Cleaner**

**\*\*Goal:\*\*** Remove inactive subscribers.

**\*\*Steps:\*\***

1. Flag subscribers with no opens in 90 days.
2. Send a "still interested?" email.
3. Remove non-responders.

## **B12 — Appointment Reminder**

**\*\*Goal:\*\*** Fewer no-shows.

**\*\*Steps:\*\***

1. 48h before: confirmation ask.
2. 24h before: reminder with details.
3. 2h before: "we're ready for you."

## **B13 — Quote Follow-Up Trio**

**\*\*Goal:\*\*** 2/5/10 day quote recovery.

**\*\*Steps:\*\*** Follow up quotes at day 2, 5 and 10 with escalating value (case study, testimonial, offer).

## **B14 — Customer Birthday/Anniversary**

**\*\*Goal:\*\*** Personal touch at scale.

**\*\*Steps:\*\*** Pre-scheduled birthday + anniversary emails with a small offer.

## **B15 — Form Abandonment Recovery**

**\*\*Goal:\*\*** Recover half-filled enquiries.

**\*\*Steps:\*\*** When someone starts a form but doesn't finish, email within 1h: "Did you get stuck?"

## **B16 — Event Reminder Chain**

**\*\*Goal:\*\*** Event attendance.

**\*\*Steps:\*\*** 7 days, 3 days, 1 day, 2 hours before.

## **B17 — Price Drop Alerts (Internal)**

**\*\*Goal:\*\*** Track supplier prices.

**\*\*Steps:\*\*** Agent monitors supplier pages weekly and alerts on changes.

## **B18 — Job Status Updates**

**\*\*Goal:\*\*** Customers always know where things are.

**\*\*Steps:\*\*** Automated updates at quote → booked → started → complete.

## **B19 — Feedback Loop**

**\*\*Goal:\*\*** Monthly NPS-style check-in.

**\*\*Steps:\*\*** One-question survey to all customers, results to a dashboard.

## **B20 — Win-Back Campaign**

**\*\*Goal:\*\*** Reactivate lapsed customers.

**\*\*Steps:\*\*** 90-day inactive customers get a "we miss you" offer sequence.

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# **2. Lead Generation Blueprints (20)**

## **L01 — Lead Scoring Agent**

**\*\*Goal:\*\*** Know which lead to call first.

**\*\*Steps:\*\***

1. Connect inbox, forms, WhatsApp.
2. Score every enquiry: hot (ready), warm (interested), cold (browsing).

3. Hot leads ping your phone in 30 seconds.

## **L02 — Instant Lead Alerts**

**\*\*Goal:\*\*** Never miss a hot lead.

**\*\*Steps:\*\*** Every enquiry → immediate phone/WhatsApp alert with the details.

## **L03 — Form-to-Follow-Up**

**\*\*Goal:\*\*** Website forms answered in minutes.

**\*\*Steps:\*\*** Form submission → instant AI reply → human follow-up within 1h.

## **L04 — Quote Responder**

**\*\*Goal:\*\*** Quotes out same day.

**\*\*Steps:\*\*** Enquiry → draft quote → send → track.

## **L05 — Google Review Magnet**

**\*\*Goal:\*\*** More reviews, better ranking.

**\*\*Steps:\*\*** Job complete → automated review request sequence.

## **L06 — Competitor Watch**

**\*\*Goal:\*\*** Know what rivals change.

**\*\*Steps:\*\*** Daily scan of competitor sites, pricing, offers. Weekly report.

## **L07 — Directory Lister**

**\*\*Goal:\*\*** Business listed everywhere.

**\*\*Steps:\*\*** Agent generates listings for 50+ directories with consistent info.

## **L08 — Social Listening**

**\*\*Goal:\*\*** Find people asking for your service.

**\*\*Steps:\*\*** Monitor Reddit, Facebook groups, forums for "recommend a plumber in X".

## **L09 — Referral Request**

**\*\*Goal:\*\*** Systematic referral generation.

**\*\*Steps:\*\*** Happy customer → 2 weeks later → "know anyone who needs us?"

## **L10 — Local SEO Builder**

**\*\*Goal:\*\*** Rank for "near me".

**\*\*Steps:\*\*** Optimise Google Business Profile, get reviews, build local content.

## **L11 — Case Study Collector**

**\*\*Goal:\*\*** Proof you can show.

**\*\*Steps:\*\*** Job complete → automated "what results did you get?" capture → case study draft.

## **L12 — Landing Page Tester**

**\*\*Goal:\*\*** Know what converts.

**\*\*Steps:\*\*** A/B test headlines and offers, agent reports winner.

## **L13 — Lost Lead Autopsy**

**\*\*Goal:\*\*** Learn why leads die.

**\*\*Steps:\*\*** Unconverted leads get a 2-question exit survey.

## **L14 — Upsell Detector**

**\*\*Goal:\*\*** Spot expansion opportunities.

**\*\*Steps:\*\*** Agent flags customers due for maintenance/replacement.

## **L15 — Job Alert Monitor**

**\*\*Goal:\*\*** Find contract opportunities.

**\*\*Steps:\*\*** Scan job boards and tender sites for your trade.

## **L16 — Quotation Library**

**\*\*Goal:\*\*** Consistent, fast quotes.

**\*\*Steps:\*\*** Template library + auto-personalisation by job type.

## **L17 — Lead Nurture Drip**

**\*\*Goal:\*\*** Warm leads become customers.

**\*\*Steps:\*\*** 7-day automated sequence with value, proof, offer.

## **L18 — Seasonal Promo Planner**

**\*\*Goal:\*\*** Right offer at the right time.

**\*\*Steps:\*\*** Calendar of seasonal campaigns (boiler checks, winter prep, summer builds).

## **L19 — Customer Health Score**

**\*\*Goal:\*\*** See who's at risk.

**\*\*Steps:\*\*** Agent scores customers by engagement, flags at-risk accounts.

## **L20 — Partner Finder**

**\*\*Goal:\*\*** Referral partnerships.

**\*\*Steps:\*\*** Agent identifies complementary businesses and drafts outreach.

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## **3. Social Media Blueprints (15)**

### **S01 — Content Calendar Generator**

**\*\*Goal:\*\*** A month of posts in an hour.

**\*\*Steps:\*\*** 1 keyword → 30 post ideas → calendar with hooks.

### **S02 — Auto-Poster**

**\*\*Goal:\*\*** Post on schedule everywhere.

**\*\*Steps:\*\*** Connect platforms, schedule posts, agent publishes.

### **S03 — Repurposer**

**\*\*Goal:\*\*** One video, ten posts.

**\*\*Steps:\*\*** YouTube video → Short, tweet, LinkedIn post, IG caption, newsletter section.

### **S04 — Hashtag Researcher**

**\*\*Goal:\*\*** Reach the right people.

**\*\*Steps:\*\*** Agent finds trending hashtags per niche.

### **S05 — Comment Responder**

**\*\*Goal:\*\*** Engagement without the time.

**\*\*Steps:\*\*** Agent drafts replies to comments, you approve.

### **S06 — DM Auto-Responder**

**\*\*Goal:\*\*** Every DM answered fast.

**\*\*Steps:\*\*** Instant reply + routing to sales.

### **S07 — Engagement Scheduler**

**\*\*Goal:\*\*** Consistent daily activity.

**\*\*Steps:\*\*** Like/comment/follow plan, tracked daily.

### **S08 — Trend Watcher**

**\*\*Goal:\*\*** Ride trends early.

**\*\*Steps:\*\*** Daily scan of trending topics in your niche.

## **S09 — Social Proof Collector**

**\*\*Goal:\*\*** Screenshot-worthy results.

**\*\*Steps:\*\*** Collect wins, testimonials, reviews → social posts.

## **S10 — Weekly Growth Report**

**\*\*Goal:\*\*** Know what works.

**\*\*Steps:\*\*** Followers, reach, engagement by platform, weekly.

## **S11 — Profile Optimiser**

**\*\*Goal:\*\*** Profiles that convert.

**\*\*Steps:\*\*** Bio, keywords, CTA review monthly.

## **S12 — Story Template Bank**

**\*\*Goal:\*\*** Daily stories in minutes.

**\*\*Steps:\*\*** 30 story templates by category.

## **S13 — Viral Hook Library**

**\*\*Goal:\*\*** Hooks that stop thumbs.

**\*\*Steps:\*\*** 100 proven hook formulas by niche.

## **S14 — Community Builder**

**\*\*Goal:\*\*** Grow your group.

**\*\*Steps:\*\*** Daily value posts + engagement prompts.

## **S15 — Influencer Outreach**

**\*\*Goal:\*\*** Collaborations.

**\*\*Steps:\*\*** Find relevant micro-influencers, draft partnership outreach.

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# **4. SEO Blueprints (15)**

## **E01 — Keyword Research System**

**\*\*Goal:\*\*** Keywords you can win.



**\*\*Steps:\*\*** Topic → related searches → competition check → shortlist.

## **E02 — Article Pipeline**

**\*\*Goal:\*\*** Rank with consistency.

**\*\*Steps:\*\*** Keyword → research → outline → write → publish → link.

## **E03 — Internal Linking Map**

**\*\*Goal:\*\*** Pass authority around your site.

**\*\*Steps:\*\*** Agent maps pages, adds internal links, reports orphans.

## **E04 — Title/Meta Optimiser**

**\*\*Goal:\*\*** Higher click-through.

**\*\*Steps:\*\*** Audit titles <60 chars, descriptions <160, add keywords.

## **E05 — Ranking Tracker**

**\*\*Goal:\*\*** Know your positions.

**\*\*Steps:\*\*** Daily position check, weekly report, alerts on drops.

## **E06 — Competitor Content Gap**

**\*\*Goal:\*\*** Outrank rivals.

**\*\*Steps:\*\*** Compare your pages vs top 10, find missing topics.

## **E07 — Schema Builder**

**\*\*Goal:\*\*** Rich results.

**\*\*Steps:\*\*** Add structured data (local business, FAQ, reviews).

## **E08 — Broken Link Finder**

**\*\*Goal:\*\*** Clean site, better crawl.

**\*\*Steps:\*\*** Monthly scan, auto-report, fix list.

## **E09 — Page Speed Watcher**

**\*\*Goal:\*\*** Fast pages rank.

**\*\*Steps:\*\*** Monthly speed test, flag slow pages.

## **E10 — Local Pack Optimiser**

**\*\*Goal:\*\*** Win the map.

**\*\*Steps:\*\*** GBP optimisation, review velocity, local content.

## **E11 — Sitemap & Indexing Monitor**

**\*\*Goal:\*\*** Pages get found.

**\*\*Steps:\*\*** Sitemap health, indexation check, resubmit when needed.

## **E12 — Content Refresh Alerts**

**\*\*Goal:\*\*** Keep rankings.

**\*\*Steps:\*\*** Flag posts dropping; refresh with new stats.

## **E13 — Backlink Tracker**

**\*\*Goal:\*\*** Know your links.

**\*\*Steps:\*\*** New/lost backlinks weekly.

## **E14 — FAQ Page Builder**

**\*\*Goal:\*\*** Answer questions, win snippets.

**\*\*Steps:\*\*** Collect real questions, build FAQ schema pages.

## **E15 — SEO Report Automator**

**\*\*Goal:\*\*** Monthly client-ready report.

**\*\*Steps:\*\*** Rankings, traffic, links, actions — one PDF.

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# **5. Customer Support Blueprints (15)**

## **C01 — FAQ Auto-Responder**

**\*\*Goal:\*\*** Instant answers.

**\*\*Steps:\*\*** Connect your FAQ → AI answers common questions 24/7.

## **C02 — Ticket Sorter**

**\*\*Goal:\*\*** Urgent first.

**\*\*Steps:\*\*** Every enquiry → priority score → routing.

## **C03 — Support Email Drafter**

**\*\*Goal:\*\*** Fast, consistent replies.

**\*\*Steps:\*\*** Agent drafts replies in your tone; you approve.

## **C04 — Satisfaction Checker**

**\*\*Goal:\*\*** Know how you're doing.

**\*\*Steps:\*\*** Post-interaction 1-question survey.

## **C05 — Complaint Escalation**

**\*\*Goal:\*\*** Problems handled fast.

**\*\*Steps:\*\*** Angry customer → instant human alert + draft apology.

## **C06 — Appointment Book (AI)**

**\*\*Goal:\*\*** Book 24/7.

**\*\*Steps:\*\*** AI answers, checks calendar, books, confirms.

## **C07 — Warranty Tracker**

**\*\*Goal:\*\*** Never miss a claim.

**\*\*Steps:\*\*** Track installs/deliveries, alert when warranty active.

## **C08 — Service Reminder**

**\*\*Goal:\*\*** Recurring revenue.

**\*\*Steps:\*\*** Annual service due → automated reminder + booking link.

## **C09 — Job Status Tracker**

**\*\*Goal:\*\*** Customers informed.

**\*\*Steps:\*\*** Auto-updates at each job stage.

## **C10 — Knowledge Base Builder**

**\*\*Goal:\*\*** Answers on tap.

**\*\*Steps:\*\*** Turn support replies into searchable articles.

## **C11 — Review Responder**

**\*\*Goal:\*\*** Every review answered.

**\*\*Steps:\*\*** New review → thank-you/response draft (public reply).

## **C12 — Escalation Router**

**\*\*Goal:\*\*** Right person, right time.

**\*\*Steps:\*\*** Rules-based routing: billing → accounts, technical → team.

## **C13 — Onboarding Check-Ins**

**\*\*Goal:\*\*** New customers feel looked after.

**\*\*Steps:\*\*** Day 1, 7, 30 check-ins.

## **C14 — Cancellation Saver**

**\*\*Goal:\*\*** Save at-risk accounts.

**\*\*Steps:\*\*** Cancel request → retention offer flow.

## **C15 — Support Analytics**

**\*\*Goal:\*\*** Improve over time.

**\*\*Steps:\*\*** Monthly: top questions, response times, satisfaction.

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# **6. Invoicing & Admin Blueprints (15)**

## **I01 — Invoice Generator**

**\*\*Goal:\*\*** Bills out on time.

**\*\*Steps:\*\*** Job done → invoice auto-created and sent.

## **I02 — Late Payment Nudger**

**\*\*Goal:\*\*** Get paid faster.

**\*\*Steps:\*\*** Day 0/7/14 escalation with payment links.

## **I03 — Expense Tracker**

**\*\*Goal:\*\*** Know your costs.

**\*\*Steps:\*\*** Receipts → categorised → monthly report.

## **I04 — Cash Flow Forecast**

**\*\*Goal:\*\*** See the future.

**\*\*Steps:\*\*** Invoices + expenses → 90-day projection.

## **I05 — Tax Season Prep**

**\*\*Goal:\*\*** Easy year-end.

**\*\*Steps:\*\*** Monthly: income/expense summary, organised by category.

## **I06 — Quote Tracker**

**\*\*Goal:\*\*** Know your close rate.

**\*\*Steps:\*\*** Quotes sent → status → win/loss → report.

## **I07 — Project Timeline**

**\*\*Goal:\*\*** Jobs on track.

**\*\*Steps:\*\*** Milestones, deadlines, alerts on slippage.

## **I08 — Daily Admin Digest**

**\*\*Goal:\*\*** One summary, all systems.

**\*\*Steps:\*\*** 8am: invoices due, jobs today, messages, leads.

## **I09 — Staff Shift Planner**

**\*\*Goal:\*\*** Coverage without spreadsheets.

**\*\*Steps:\*\*** Jobs + availability → proposed rota.

## **I10 — Supplier Price Monitor**

**\*\*Goal:\*\*** Buy smart.

**\*\*Steps:\*\*** Key materials tracked, price alerts.

## **I11 — Contract Reminder**

**\*\*Goal:\*\*** Renewals on time.

**\*\*Steps:\*\*** Renewal dates tracked, 30-day alerts.

## **I12 — Job Costing Report**

**\*\*Goal:\*\*** Know profitable jobs.

**\*\*Steps:\*\*** Job → materials + labour vs quote → margin.

## **I13 — Customer Database Cleaner**

**\*\*Goal:\*\*** Data you can trust.

**\*\*Steps:\*\*** Duplicates merged, bad contacts flagged.

## **I14 — Meeting Minutes & Actions**

**\*\*Goal:\*\*** Nothing slips.

**\*\*Steps:\*\*** Notes → action items → assigned → tracked.

## **I15 — Year In Review**

**\*\*Goal:\*\*** Annual report in minutes.

**\*\*Steps:\*\*** Revenue, jobs, reviews, growth — one page.

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## Getting started (3 steps)

1. **\*\*Pick ONE blueprint\*\*** that saves you the most time this week.
2. **\*\*Copy the prompt\*\*** into your AI agent (Hermes, Claude, ChatGPT).
3. **\*\*Run it for 7 days\*\*** — then add the next one.

Lifetime updates included. New blueprints added monthly.

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