Lukas Labs

PRACTICAL FIELD GUIDE

THE SMALL BUSINESS AUTOMATION PLAYBOOK

What should you automate first?

Spot the work that keeps repeating, see whether your apps can talk to each other, and pick one workflow worth testing.



INSIDE

A repeat-work checklist • A plain-English API check
Three worked examples • A fill-in worksheet

01 / NOTICE THE PATTERN

Start with the repeat work.

You don’t need an AI tool to get started. Think about yesterday and look for work that happens the same way again and again.

You copy it.
Contact details move from your inbox to a spreadsheet or a customer system.

You sort it.
Someone reads the same kinds of messages and decides who should handle them.

You chase it.
Quotes, callbacks, invoices or approvals stall until someone remembers to follow up.

TAKE ONE TASK APART

1. **What starts it?**
   A call comes in, a form is submitted, an email arrives, or an invoice comes due.
2. **How often does it happen?**
   Estimate how many times per week and how long each one takes.
3. **What happens when it waits?**
   Count the missed inquiry, delayed quote, or repeat work, not just the minutes.
4. **What still needs a person?**
   Look for exceptions, approvals, and decisions that depend on judgment.

THE PATTERN TO LOOK FOR

If someone keeps saying “when this happens, I do that,” you’ve found a candidate. Note what they look at to decide, which app they touch, and what they do when the usual rule doesn’t fit.

Found a task? Next, look at the apps it touches.
One short page on listing your tools and checking whether they can share information.

TURN THE PAGE →

02 / LOOK AT YOUR APPS

Which apps does it touch?

List the tools the task uses. Most small businesses already pay for apps that can share information. They just aren't connected yet.

COMMON PLACES YOUR INFORMATION LIVES

Email Outlook, Gmail	**Calendar** Outlook, Google, Calendly	**Invoices & payments** QuickBooks, Square	**Customers & jobs** Jobber, HubSpot
Spreadsheets Excel, Google Sheets	**Phone & texts** Your business line	**Website** Contact and quote forms	**Store** Shopify, Etsy, Square

FOLLOW THE INFORMATION FOR ONE TASK

Where does it start?
The app where the information shows up first.

e.g. a quote request in Gmail

→

Where should it go?
The app where someone needs it to do the work.

e.g. your customer list in Jobber

→

Who needs to know?
The person, and how: text, email, or a task.

e.g. a text to whoever does quotes

CAN THEY CONNECT? THREE QUICK CHECKS

1. **Look for a built-in connection.**
   In each app's settings, look for "Integrations," "Connected apps" or "App marketplace," and search for the other tool's name.

2. **Check it does the exact job.**
   Some connections only copy one thing one way. Make sure it can do what you need, like create a new customer, not just look one up.

3. **Still not sure? Ask the app company.**
   "Can other apps send information into this, or pull it out?" Techies call that an API. A yes means it can almost certainly be connected.

Not sure? That's fine.
Write down the app names. We check the connections on the free consult.

TURN THE PAGE →

03 / EXAMPLE: THE INBOX

The busy inbox.

Quote requests, supplier bills and customer questions all land in one inbox. Someone has to read every one and decide who handles it.

TODAY

Someone opens each email, works out what it is, and forwards it. Quote requests sit between bills and newsletters, and the good ones get buried.

WITH YOUR AUTOMATION ASSISTANT

Each email is sorted the moment it arrives. The right person gets it, quote requests get a reply drafted, and anything odd waits for a person.

STEP BY STEP

1. **An email arrives.** — Outlook or Gmail

   The assistant notices every new message in your shared inbox.

2. **It works out what the email is about.** — AI for the messy ones

   Simple rules catch the obvious ones. AI reads the rest, the way a person would.

3. **It sends it to the right place.** — Your team

   Each email ends up in one of three places:

   New quote request
   Sales gets it, with a reply already drafted for them to check.

   Supplier bill
   Goes to whoever does the books. Never paid automatically.

   Unclear or sensitive
   Left in the inbox for a person to read.

WALK ONE EMAIL THROUGH IT

“Can you quote a patio cover in 85339?” The assistant sees a quote request, notes the ZIP code, and drafts a friendly “thanks, we’re on it” reply. Sales checks it and hits send.

YOU STAY IN CHARGE

Nothing goes to a customer until a person checks it, at least until you decide you trust it. You choose the rules and who gets what.

WHERE DOES THIS SHOW UP FOR YOU?

Which two kinds of email does your team sort over and over? Who should get each one, and what words give it away?

04 / EXAMPLE: THE LEAD TRACKER

The lead tracker.

If someone copies requests from your website form into a spreadsheet, start here. This one does not even need AI.

TODAY

A request comes in. Someone retypes the name, number and job into a spreadsheet, then has to remember to check that somebody called back.

WITH YOUR AUTOMATION ASSISTANT

The request lands in your tracker by itself, the right person gets a heads-up, and anything nobody has touched by the end of the day gets flagged.

STEP BY STEP

1. **A request comes in.** — Website form
   The customer fills in their name, phone number, the job, and their ZIP code.
2. **A new row appears in your tracker.** — Google Sheets or Excel
   No copying and pasting. The details land in the right columns.
3. **It checks the request and acts.** — Your rules
   Every new row ends up in one of three places:

   Ready to go
   Marked “New,” and the right person gets a text or email.

   Missing a detail
   Marked “Needs info” for a quick follow-up.

   Outside your area
   Flagged for the owner to decide.
4. **At the end of the day, it double-checks.** — Scheduled check
   Anything still unassigned gets flagged, so no lead sits overnight.

WALK ONE REQUEST THROUGH IT

A fence quote comes in with a phone number and a local ZIP. It lands in the tracker as “New,” and the estimator gets a text within a minute. Nobody typed a thing.

YOU STAY IN CHARGE

The rules are yours: which ZIP codes you serve, who gets which jobs, and what counts as urgent. Change them any time.

WHERE DOES THIS SHOW UP FOR YOU?

Think bookings, job requests or inventory. Which columns get typed in by hand? What should tell someone it is time to act?

05 / EXAMPLE: THE MISSED CALL

The missed call.

When your team is on a job, with a customer, or closed for the day, calls go to voicemail, and many callers simply try the next company.

TODAY

Quote requests, existing customers and urgent calls all land in the same voicemail. Someone listens later and calls back, sometimes too late.

WITH YOUR AUTOMATION ASSISTANT

Peg, our AI receptionist, answers, finds out why they are calling, and gets the details to the right person right away. She can book the appointment too.

STEP BY STEP

1. **A call is not picked up.** — Your business line
   Start small: only calls your team misses, or only after hours.
2. **Peg answers and asks why they are calling.** — AI receptionist
   She says she is an AI assistant and keeps it short and friendly.
3. **She takes the right next step.** — Your calendar and team
   Each call ends one of three ways:

   New job
   She takes the details and can book a time on your calendar.

   Existing customer
   She passes the message to the person who handles it.

   Urgent or unclear
   She follows your backup plan. She never guesses or promises.

IT WORKS THE OTHER WAY, TOO

When someone asks for a callback on your website and agrees to an AI call, Peg can call them, gather the details and book a time. Hear her for yourself at **lukaslabs.ai/call-me**.

YOU STAY IN CHARGE

You decide what Peg can say, what she can book, and when a call goes straight to a person. You get a summary of every call.

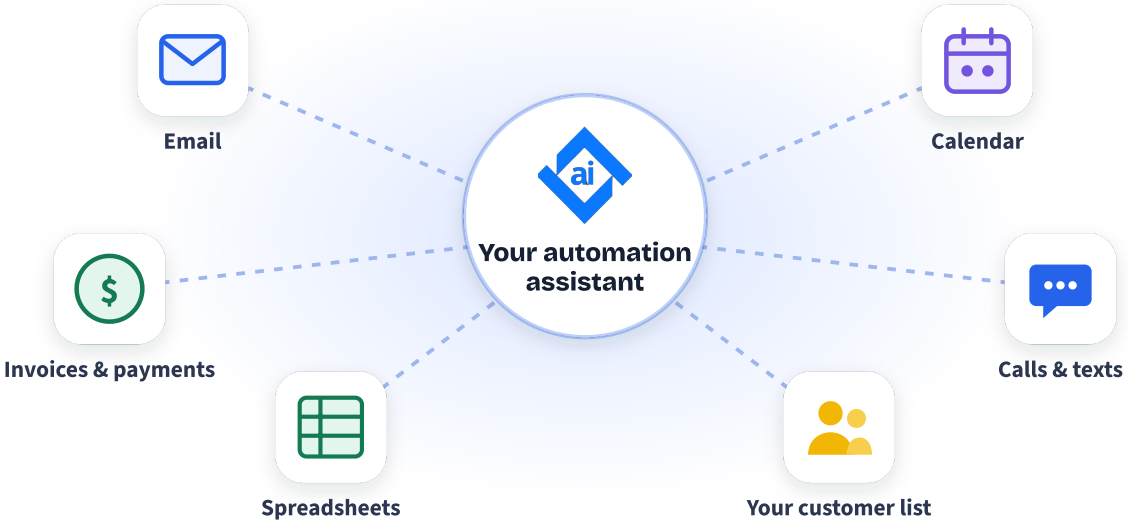
WHERE DOES THIS SHOW UP FOR YOU?

How many calls go to voicemail in a busy week? Which of your forms already asks for a callback?

06 / HOW IT WORKS

Meet your automation assistant.

All three examples run the same way underneath. No coding, and you never have to open ChatGPT: picture a dependable office assistant who sits between the apps you already use.



1 It watches.

For the moment something happens: an email arrives, a form is filled in, a call is missed, an invoice goes past due.

2 It carries the details.

It copies the name, phone number or amount from one app to the next, so nobody retypes it.

3 It does the next step.

It sends the reminder, books the time, or taps the right person on the shoulder.

SEE IT IN ONE SENTENCE

A customer fills in your quote form at 9 PM. By 9:01 they are in your customer list, they have a friendly “got it” email, and you know who to call first in the morning. Nobody typed a thing.

PLAIN ANSWERS TO FAIR QUESTIONS

How do the apps talk? Most business apps have a built-in "door" (techies call it an API) for sharing information. The assistant uses those doors for you.

Who is in charge? You are. Anything unusual, costly or sensitive comes to a person first, and it only gets the access it needs.

Where does AI fit? Only for the messy parts, like reading a rambling email or talking on the phone. Simple rules handle the rest.

What if something breaks? It is tested with sample cases first, and someone gets an alert if a step fails.

07 / HOW WE HELP

Where Lukas Labs fits in.

You know your business. We know how to wire it together. We design, build and run your automation assistant, so you never touch the technical side.

YOU BRING
The tasks that eat your week, the apps you use, and the calls only a person should make.

WE HANDLE
The design, the connections, the testing, the hosting, and keeping it all running.

1. **Free 20-minute consult** FREE
   Tell us how a normal week runs. We listen for the work that repeats and point out 2 or 3 things worth automating.
2. **Your plan**
   For each task: what starts it, which apps it touches, and where a person decides. Plain English, with a fixed quote.
3. **We build and test it**
   We set up your own private automation assistant, connect your apps, and test with real examples before anything goes live.
4. **We keep it running**
   We watch for problems, fix things when an app changes, and adjust it as your business grows.

Small-business pricing. One setup fee, then a simple monthly plan that covers hosting, AI usage and upkeep. You get a fixed quote before anything is built.

Find your first automation.

Book a free 20-minute consult. Bring one task and leave with real ideas, whether or not we work together.

Book my free consult →

or go to lukaslabs.ai/book/consult

SCAN TO BOOK