

□ STRATEGY & CONSULTING PLAYBOOK

AI Setup Pros — Service Delivery Guide

SERVICE 6 OF 6

AISetupPros Internal Use Only · Version 1.0

□ SERVICE OVERVIEW

Full tech stack audit, custom automation roadmap, and implementation management. A discovery-first engagement that maps the client's business, identifies automation opportunities, and builds a prioritized plan to execute.

□ Time to Deploy	7-14 days (discovery + roadmap delivery)
□ Service Tier	Professional / Enterprise (always starts here)
□ Stack	Discovery interviews + Gap analysis + Roadmap document
□ Who Delivers	Senior consultant / Atlas (with client interviews)

□ PHASE 1 — DISCOVERY

Step 1: Schedule Discovery Call

1. Book a 60-minute video call with the client decision-maker
2. Send a pre-call questionnaire:
 - What tools does the team currently use?
 - What are the top 3 pain points?

- What does a "successful automation" look like?
- How many hours per week are spent on manual tasks?

3. Request access to their current tools (read-only is fine for audit)

Step 2: Conduct Tech Stack Audit

Document everything in their stack:

- **CRM** — Current system, usage level, pipeline stages
- **Website & Forms** — Platform, form builder, lead capture process
- **Email & SMS** — Platform, current sequences, volume
- **Calendar & Scheduling** — Tool, booking workflow
- **Social Media** — Accounts, posting frequency, engagement
- **Payments & Billing** — Processor, invoicing process
- **Internal Communication** — Slack, Teams, email
- **Other Tools** — Anything else they pay for or use

Step 3: Score the Current Setup

Rate each area 1-10:

Category	Score	Notes
CRM Usage & Pipeline	/10	
Lead Capture & Follow-Up	/10	
Email & SMS Automation	/10	
Social Media & Content	/10	
Client Onboarding & Workflows	/10	

□ **AUDIT SCORE:** Add up all 5 categories. Total /50 determines severity:
 40-50: Strong foundation — focus on optimization
 25-39: Moderate gaps — targeted automations needed
 Below 25: Foundation first — build before automating

PHASE 2 — ROADMAP

Step 4: Identify Quick Wins (Week 1-2)

Automation opportunities with high impact and low effort:

- Which 1-2 tasks does the team spend the most time on?
- What causes the most "dropped balls" (missed follow-ups, lost leads)?
- What's the single biggest bottleneck in the client journey?

□ QUICK WIN CRITERIA:

- Saves 2+ hours per week per person
- Can be built in 1-3 days
- Fixes a visible, painful problem
- Generates measurable ROI

Step 5: Build the Automation Roadmap

Create a phased plan:

Phase	Timeline	Focus	Automations
Phase 1	Weeks 1-3	Foundation	CRM setup, lead capture, basic follow-up
Phase 2	Weeks 4-8	Nurture	Email sequences, SMS automation, onboarding
Phase 3	Weeks 9-16	Scale	Advanced workflows, integrations, voice AI

Step 6: Write the Proposal

Create a formal proposal document:

1. Executive summary of current state
2. Audit score with commentary
3. Top 3-5 automation opportunities
4. Phased roadmap with pricing per phase
5. Success metrics: what does "done" look like?
6. Investment and next steps

PHASE 3 — DELIVERY

Step 7: Present to Client

1. Schedule 60-minute presentation call

2. Walk through the audit findings
3. Present the roadmap visually
4. Discuss Phase 1 pricing and timeline
5. Answer questions
6. Send proposal PDF after the call

Step 8: Agree and Launch Phase 1

1. Client signs proposal
2. Collect Phase 1 payment
3. Kick off implementation
4. Schedule weekly check-ins

COMMON ISSUES & FIXES

Symptom	Fix
Client won't share tool access	Do manual screen share walk-through in discovery call
Client has "analysis paralysis"	Focus ONLY on Phase 1 quick wins — don't show the whole roadmap
Expectation mismatch	Set clear scope boundaries; include only what's in the proposal
Client wants everything at once	Reference the phased roadmap; explain why foundation comes first
Scope creep during implementation	Document every requested addition; add to Phase 2 proposal

PREREQUISITES CHECKLIST

Item	Status
Discovery call booked (60 min video call)	<input type="checkbox"/>
Pre-call questionnaire sent	<input type="checkbox"/>
Pre-call questionnaire completed by client	<input type="checkbox"/>
Read-only access to client tools (GHL, email, calendar, etc.)	<input type="checkbox"/>

Audit score completed	<input type="checkbox"/>
Quick wins identified	<input type="checkbox"/>
Roadmap document created	<input type="checkbox"/>
Proposal PDF prepared	<input type="checkbox"/>

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