STRICTLY
SAVVY /S

AI & AUTOMATION
ROADMAP

You're realising that you **can't sit on the sidelines** when it comes to AI. Whether you're excited to dive in or feeling a little skeptical, one thing is clear: AI is already transforming the way businesses operate.

AI

By 2026, **AI-powered digital teams will be as essential as email and the internet.** These aren't just tools, they're AI-powered agents, each trained for a specific role, working together to **manage workflows, respond to customers, process data, and make smart decisions** without constant human oversight.
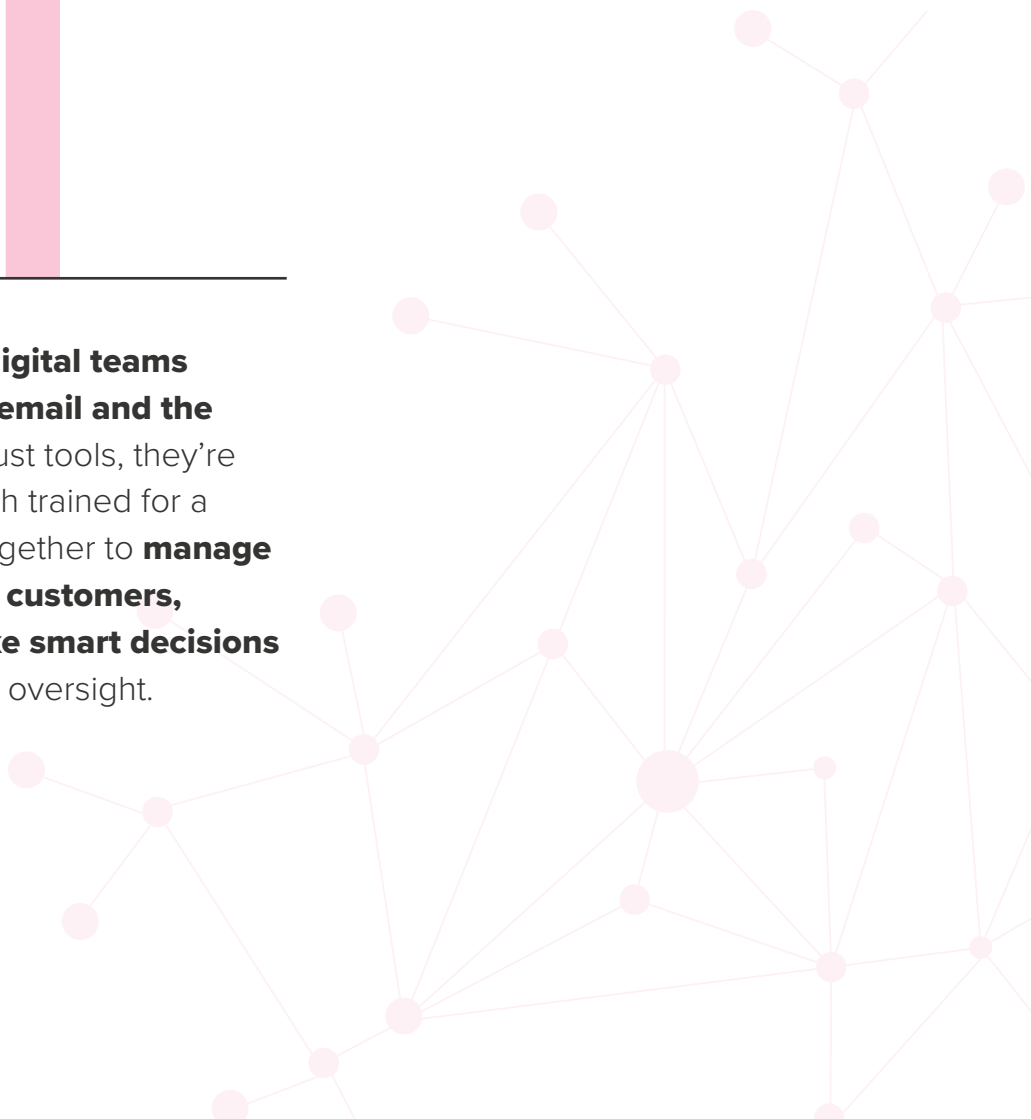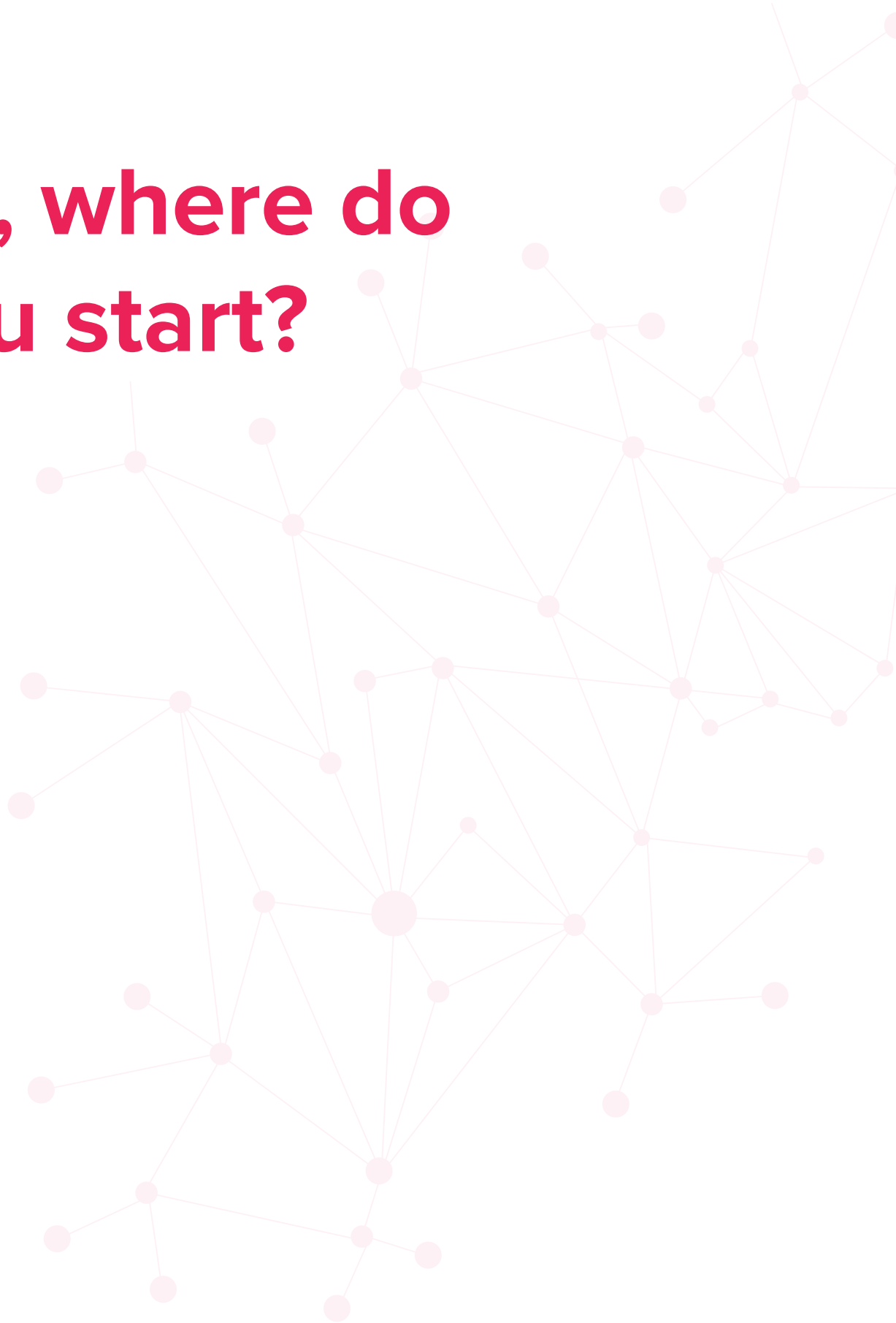
But here's the catch: you can't just switch on AI and expect miracles.

Would you hire a full team without training and onboarding? **Of course not.** AI is no different. Jumping in without the right foundation leads to chaos, inefficiencies, and frustration - not the streamlined operations you were hoping for.
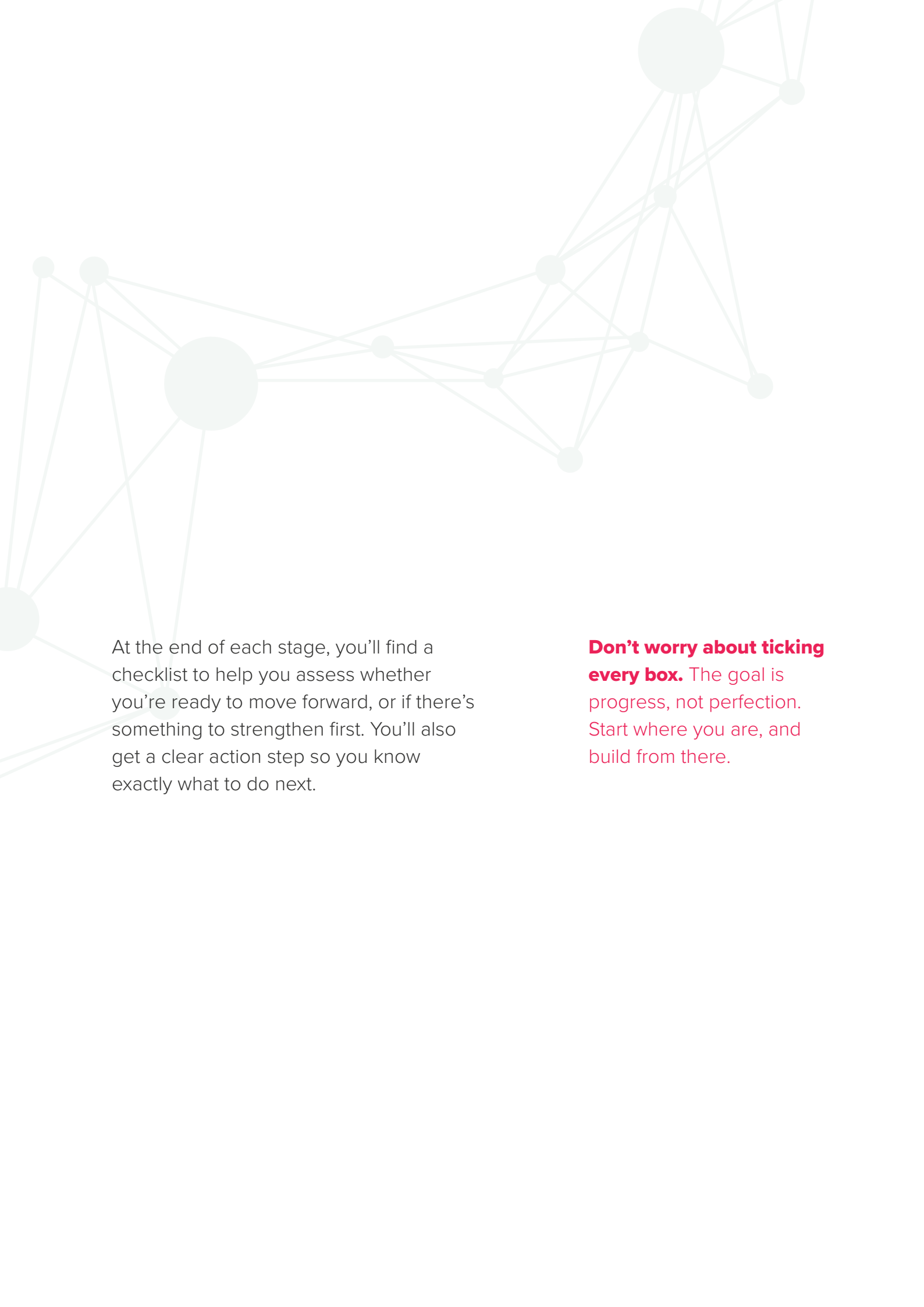
So, where do you start?

That's where **The Savvy AI Framework** comes in. This guide walks you through the five stages of AI adoption, helping you **build towards a fully functional digital team** - so AI becomes your greatest asset, not a giant tech headache.

How to use this framework

Think of this guide as your step-by-step game plan.
Each stage builds on the one before it. You'll start by checking your systems and processes, then gradually layer in automation, workflows, AI tools, and finally, a vision for scaling with digital teams.
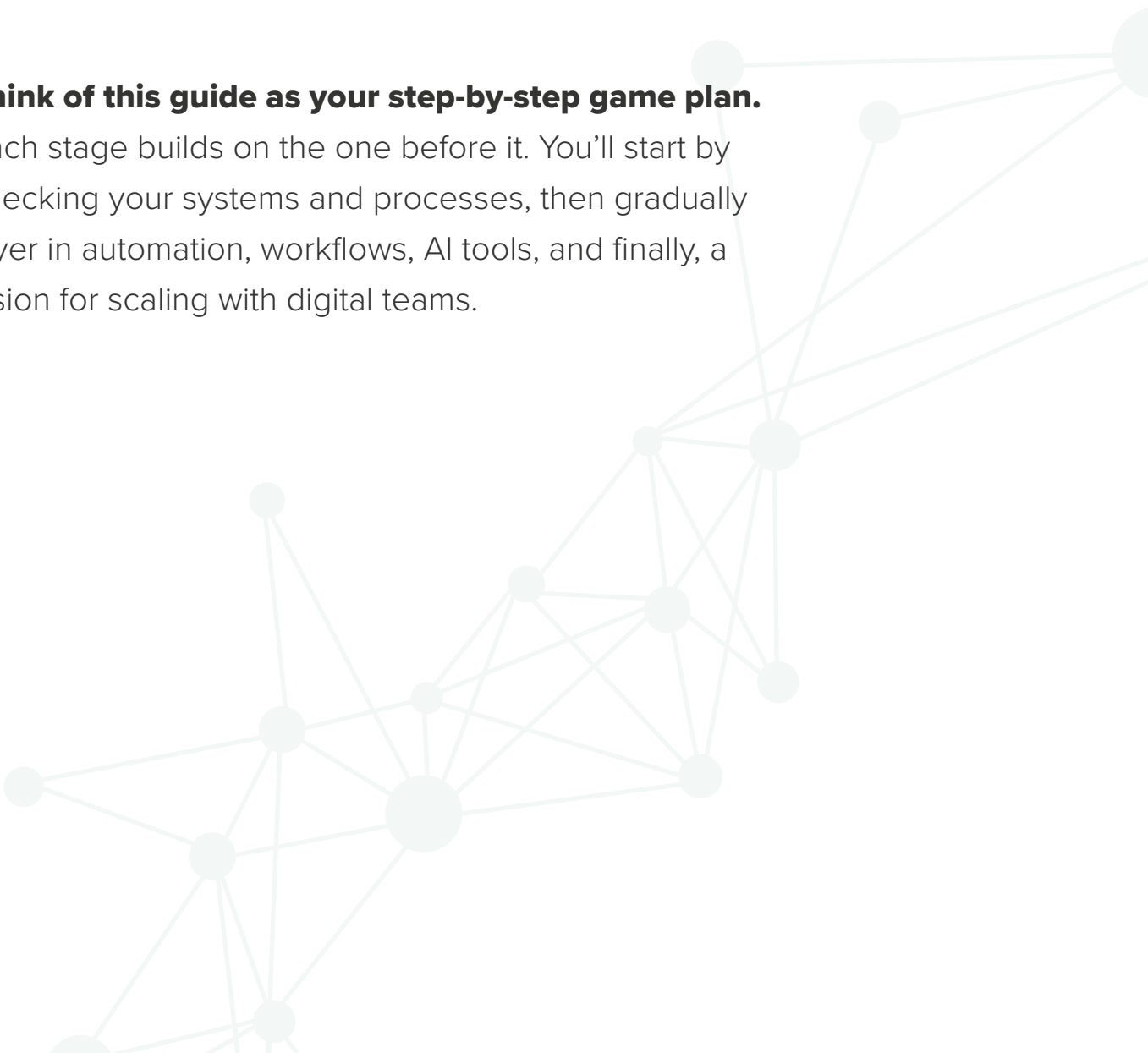
At the end of each stage, you'll find a checklist to help you assess whether you're ready to move forward, or if there's something to strengthen first. You'll also get a clear action step so you know exactly what to do next.

Don't worry about ticking every box. The goal is progress, not perfection. Start where you are, and build from there.

The Savvy AI Framework

This is our proven system for introducing AI and automation into your business the right way. **Follow these five stages to build a scalable, AI-powered operation that grows with you.**
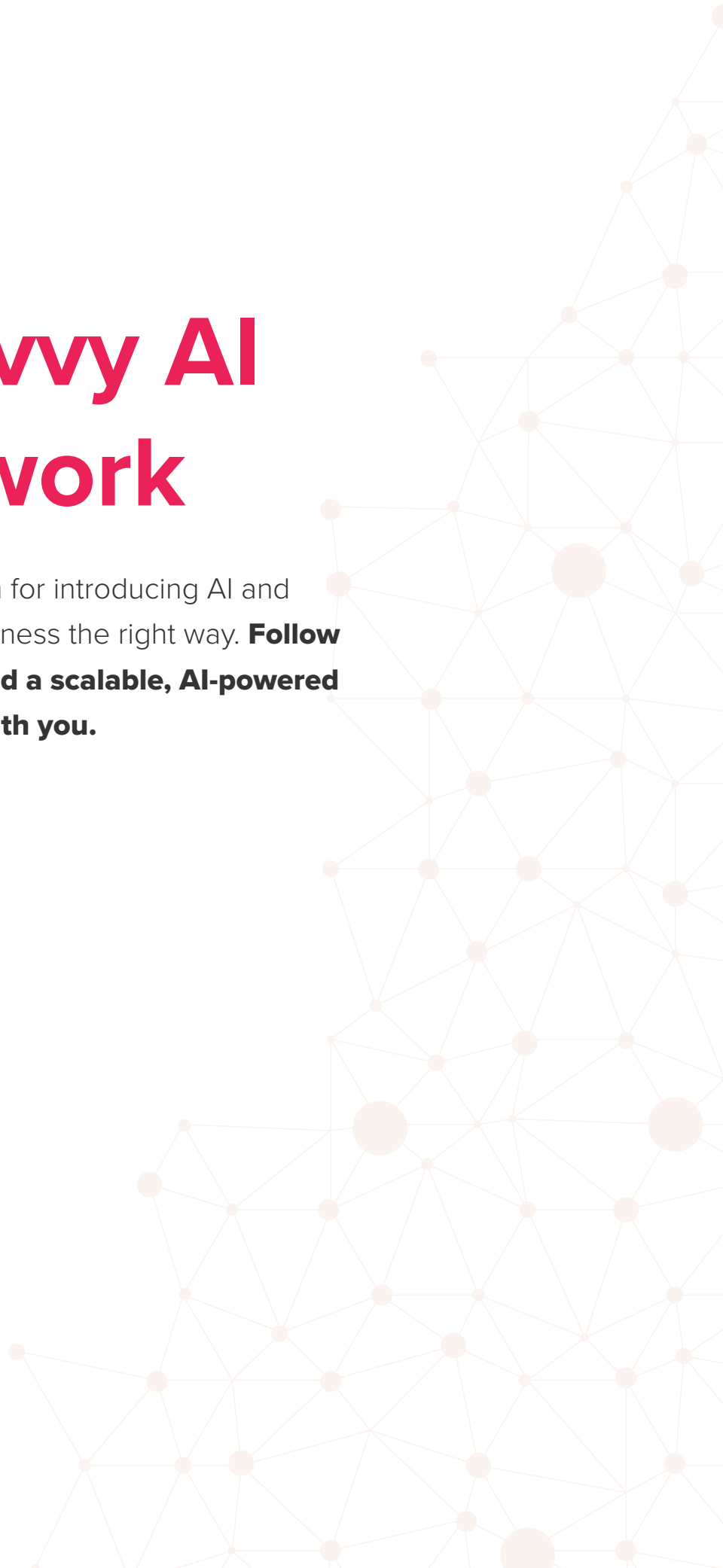
STAGE 1:
Streamline with systems

__AI isn't a magic fix - it can only improve what's already working.__ Without the right systems in place, AI will highlight and amplify the problems you already have (things like inconsistent processes, data scattered across different tools, or communication breakdowns) rather than fixing them.

Get the right foundations in place now, so your business will be able to grow in a way that's smooth, efficient, and manageable, rather than chaotic, overwhelming, and resource-heavy.

Where to focus: Use this checklist to review your current setup. For each system, ask: **Do I already have this in place? Is it working well?** If not, decide whether it's a priority for your business - and if it is, make a plan to get it sorted. If it's not relevant to what you do, skip it.

The goal isn't to check every box, it's to make sure your **foundations are solid** before adding AI into the mix.

Manage client and lead contact information so no opportunities slip through the cracks. A CRM like HubSpot, Zoho, or even an Excel spreadsheet helps you stay on top of interactions and follow-ups.

Keep projects and tasks on track with a task management tool such as Teamwork, Monday.com, or ClickUp to keep everything organised and moving forward.

Track and manage business finances so invoicing, expenses, and cash flow aren't a headache. Use software like Xero or MYOB to automate financial tracking and reporting.

Establish a professional online presence with a clear, well-designed website. Make it easy for potential clients to find you, understand what you do, and get in touch.

Ensure seamless communication across your business with a business email domain (Google Workspace, Microsoft 365) and a team messaging tool (Slack, Teamwork, Microsoft Teams) so conversations stay centralised and efficient.

Secure and centralise business files with cloud storage like Google Drive, Dropbox, or OneDrive, so you never waste time hunting for important documents and can easily share them with your team.

Safeguard sensitive information so your team can log in without the security risks. A password manager like LastPass or 1Password makes it easy and safe by allowing your team to access shared credentials securely while reducing the risk of lost or weak passwords.

Standardise key business processes for tasks like onboarding, invoicing, and follow-ups. Documenting workflows and using templates makes everything smoother, faster, and easier to delegate.

Are you ready to move to the next stage?

✔ Your client, project, and financial management systems are **clear, structured, and easy to use.**

✔ You have **repeatable processes** in place for essential business tasks - no more relying on memory or last-minute scrambling.

✔ Your systems are **saving you time**, not adding to your workload.

If you're NOT ready:

✕ **Start with the biggest gap.** For example, if you don't have a CRM, start tracking leads and client details in a spreadsheet before upgrading to a tool.

✕ **Simplify.** If you feel overwhelmed managing multiple systems, streamline where possible - use fewer, better tools that integrate well.

✕ **Get help.** If setting up financial tracking or process documentation isn't your strength, talk to an accountant or business support specialist.
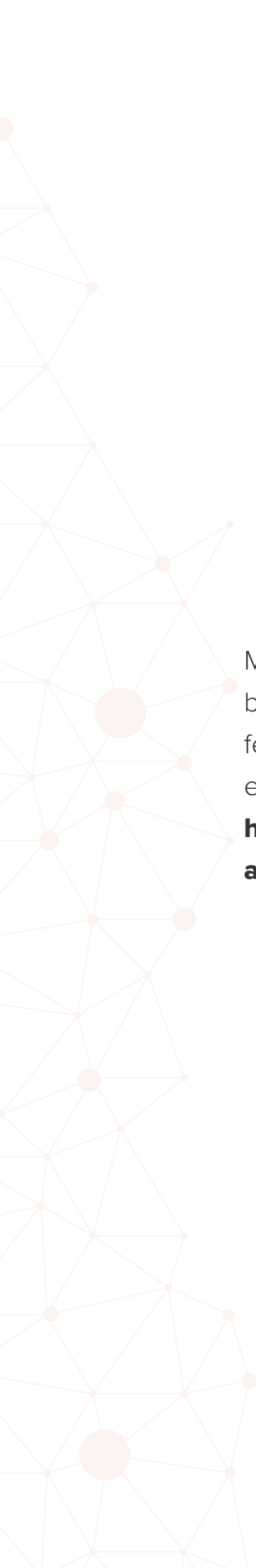
Work through this checklist and make sure your core systems are working for you, not against you. Without these foundations, AI will only magnify inefficiencies - creating more bottlenecks, information getting lost in different tools, and miscommunication instead of solving problems. AI works best when it's built on solid business foundations that support growth.
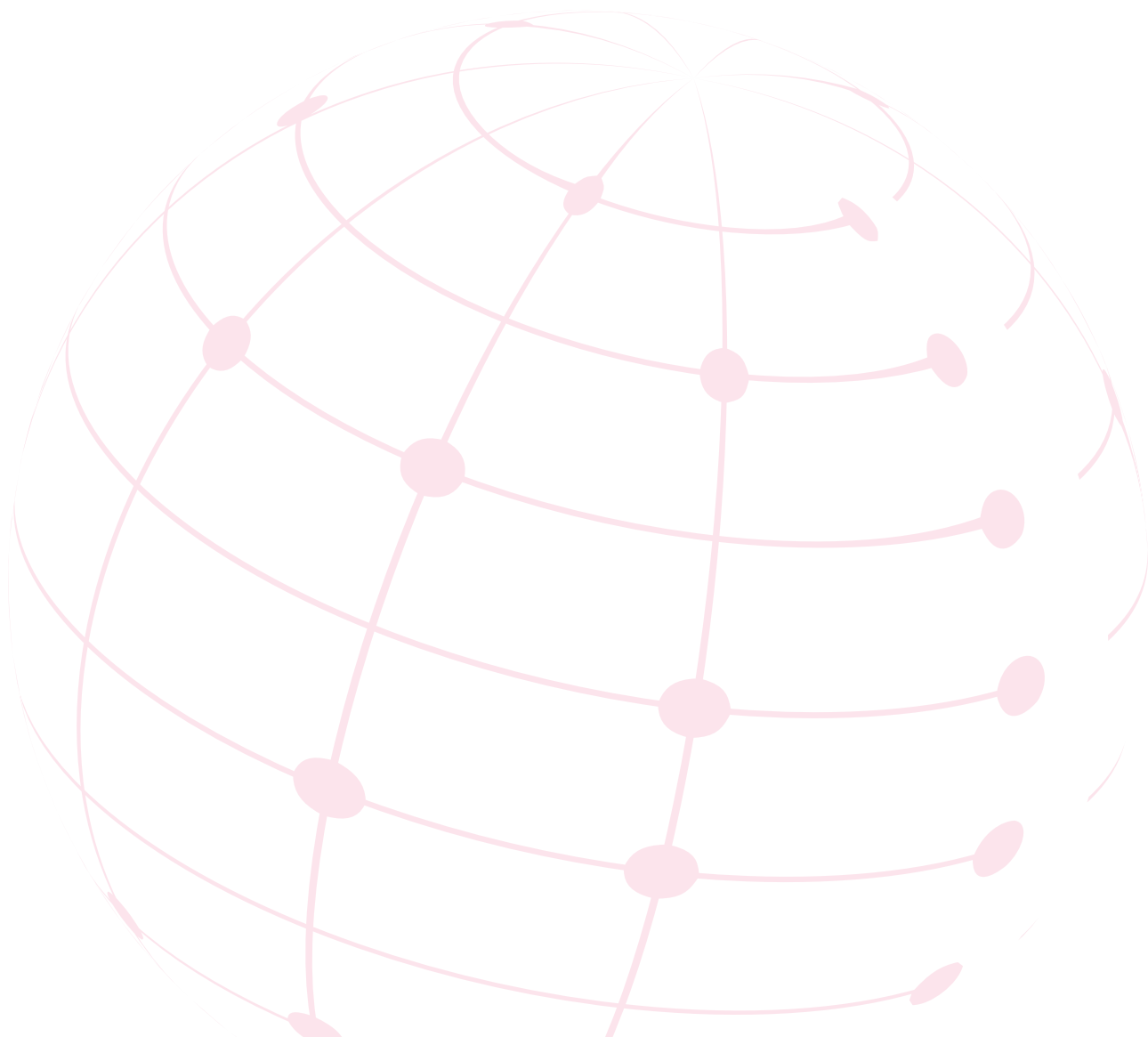
STAGE 2:
Optimise with automations

The tools that you pay for should be working for you, not the other way around. *Most platforms are packed with built-in automation features that can save you hours, but if you're not using them, you're leaving time and money on the table.*
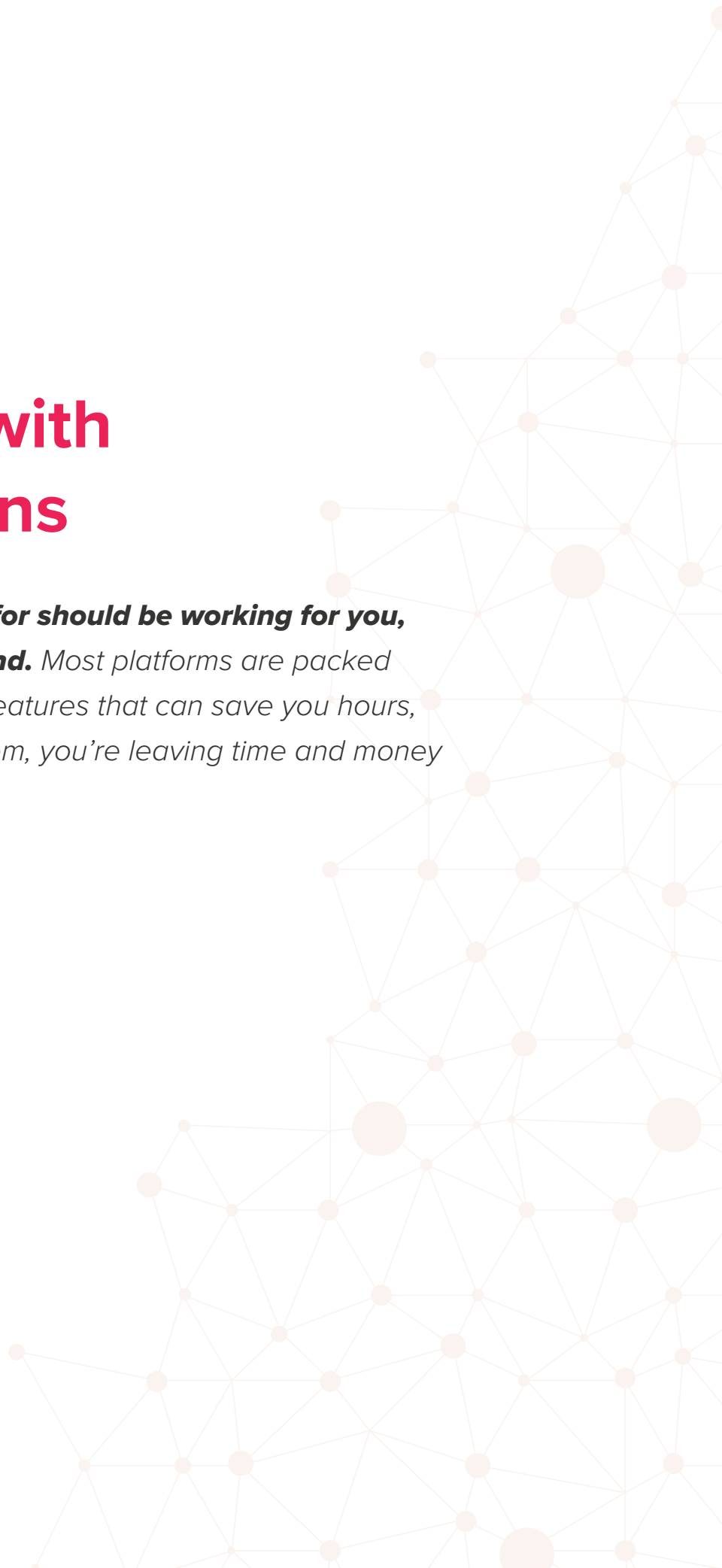
Many business owners set up a tool once and never look back, but software providers are constantly rolling out new features, updates, and automation options that you might not even realise exist. **Taking the time to explore these can help you eliminate repetitive tasks, speed up processes, and free yourself up for more valuable work**.

Where to focus: Start by looking at the tools you already use every day: your CRM, email platform, finance software, or project manager. Most of them have built-in automation features that could save you time (but are often hiding in plain sight).

Go through the list below and check off anything you've already set up. If you spot a gap, don't jump straight to a new tool. First, see what your current software is capable of. **A few small tweaks could free up hours each week without adding complexity.**

Welcome & follow-up emails – Automatically send welcome emails to new subscribers and follow-ups based on client actions (Mailchimp, HubSpot, ActiveCampaign).

Cart abandonment & lead nurturing – Nudge customers to complete purchases or re-engage with prospects (Shopify, WooCommerce, Klaviyo).

Auto-scheduled social media posts – Plan and publish posts in advance across multiple platforms (Meta Business Suite, Hootsuite, Buffer, Later).

AI-powered chatbots & auto-responses – Automate responses to FAQs and client inquiries (Facebook/Instagram Messenger, Zapier).

Automated scheduling & meeting reminders – Eliminate back-and-forth emails with automated calendar bookings and reminders (Calendly, Microsoft Bookings).

Invoice & payment automations – Send invoice reminders, auto-charge recurring payments, and reconcile transactions (Xero, QuickBooks, Stripe, GoCardless).

AI-powered email sorting & smart filters – Automatically organise emails into priority categories and flag important messages (Gmail, Outlook).

Task & workflow automation – Automatically assign tasks, track progress, and trigger workflows (Teamwork, Asana, ClickUp, Monday.com, Zapier).

Lead capture & CRM integration – Automatically pull leads from website forms, social media, and emails into your CRM (HubSpot, Zoho, Pipedrive).

Are you ready to move on?

✔ You have **automations in place across key areas of your business**, reducing manual work in client communication, marketing, admin, and financial processes.

✔ Your workflows are **saving time**, not adding complexity.

✔ You've reviewed the automation options available in each of your **existing tools** and activated the most relevant ones.

If you're NOT ready:

✘ **Start small.** Set up an automatic invoice reminder or email follow-up before diving into complex automations.

✘ **Check your current tools.** Many have automation features built in, you just need to activate them.

✘ **Get help.** If automation feels overwhelming, work with a virtual assistant or software expert to streamline the process.

Action step

Choose one automation to implement today. Even a small change can free up time instantly!
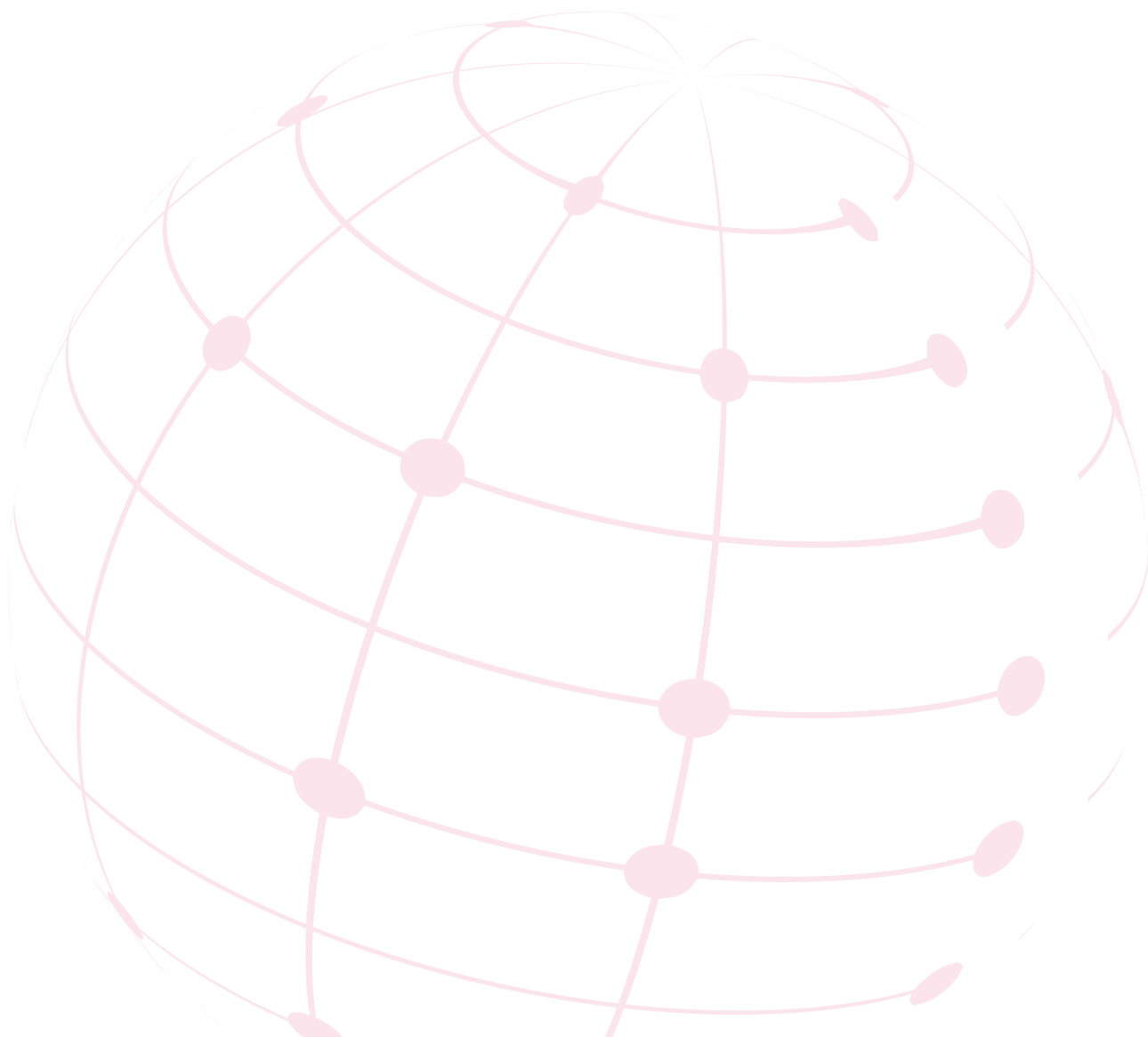
STAGE 3:
Connect with workflows

Your business tools should work together, not in isolation.
Right now, you might be manually copying information from one platform to another, repeating tasks, or missing key details because your systems aren't talking to each other. This is where workflow automation comes in.

By integrating your tools, you create seamless workflows that move information automatically between apps, eliminating manual work and reducing the risk of human error. **This means fewer repetitive tasks, more accurate data, and a business that runs smoother with less effort.**

Where to focus: Review the workflows below and take stock of what's already set up. If you spot a gap, don't try to fix everything at once, start with the biggest time-waster in your day. That's usually the best place to connect your tools and see an instant difference.

Even one small integration - like linking your CRM to your invoicing system - can save hours and reduce errors. **Focus on what will make things run smoother, faster, and with less double-handling.**

Keep tasks up to date automatically by linking your CRM and task management system, so new deals and follow-ups are logged without manual input.

Automate invoice creation based on deal statuses in your CRM to streamline financial processes

Sync client communications in one place by auto-logging emails, chat messages, and meeting notes inside your CRM.

Trigger automated follow-ups when a deal moves to a new stage (e.g., send a welcome email when a proposal is accepted or notify the team when a contract is signed).

Connect your project management tool to your accounting software so billable hours and invoices align without manual input

Use Zapier or Make to link apps and automate repetitive admin tasks without needing custom coding (e.g., auto-save email attachments to Google Drive, sync new leads from Facebook Ads to your CRM, or automatically send Slack notifications when a new task is created).

Are you ready to move on?

✔ You've checked the **integrations section** of each tool you use and explored available options.

✔ You have **at least two key integrations** that reduce manual work and improve efficiency.

✔ Your tools **share data automatically**, reducing the need for manual updates.

If you're NOT ready:

✘ **Start with the most useful integration.** Automating calendar bookings or invoice creation are simple and can provide quick wins.

✘ **Review your existing tools.** Many have built-in integrations that you aren't using yet.

✘ **Seek help if needed.** If setting up integrations feels overwhelming, work with an automation expert or use pre-built automation templates.

Action step

Choose one manual process you repeat often and find a way to connect the tools involved.
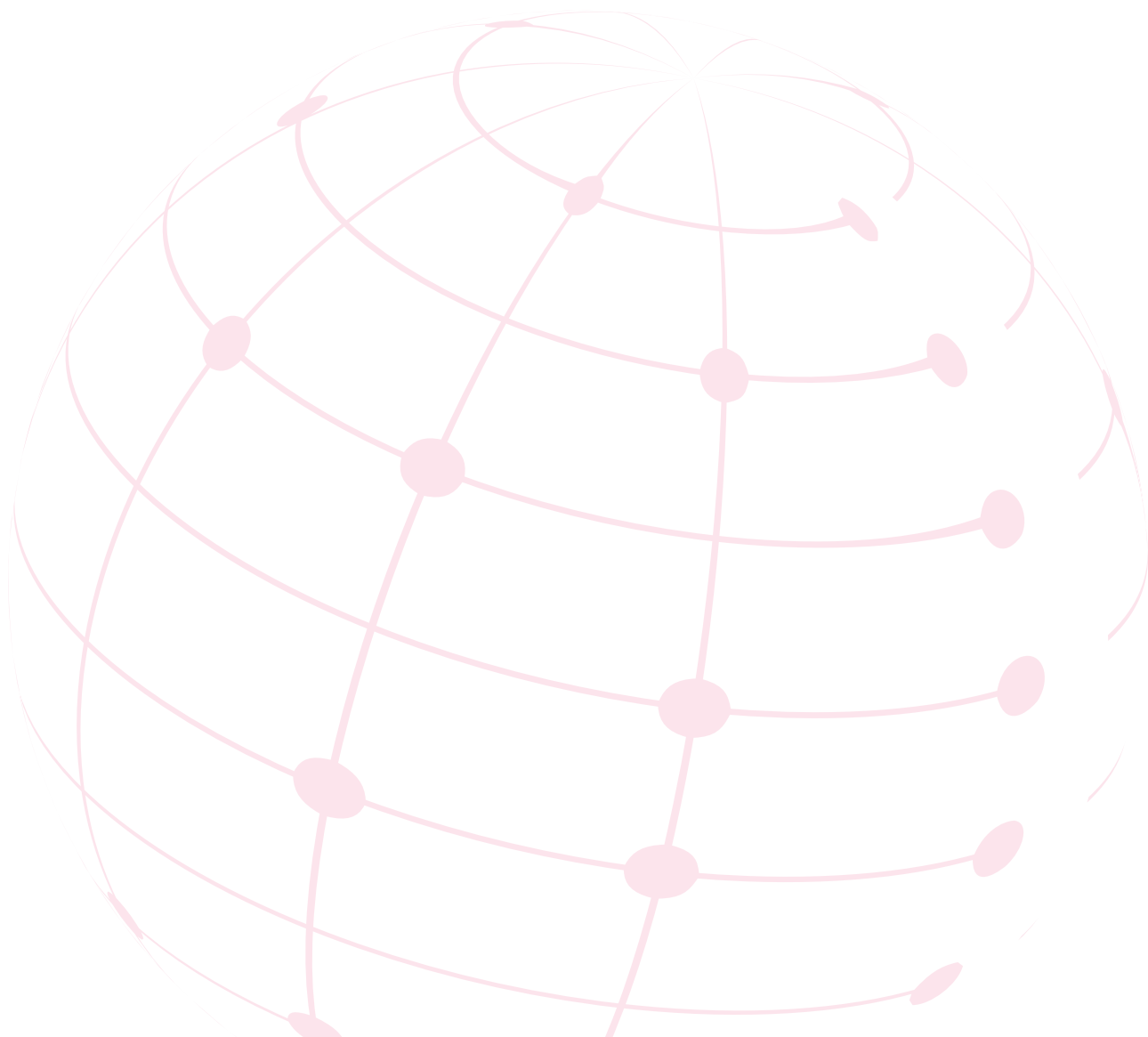
STAGE 4:
Integrate with AI

Now that your workflows are running smoothly, it's time to start using AI to take on repetitive, time-consuming tasks that don't require human judgment.

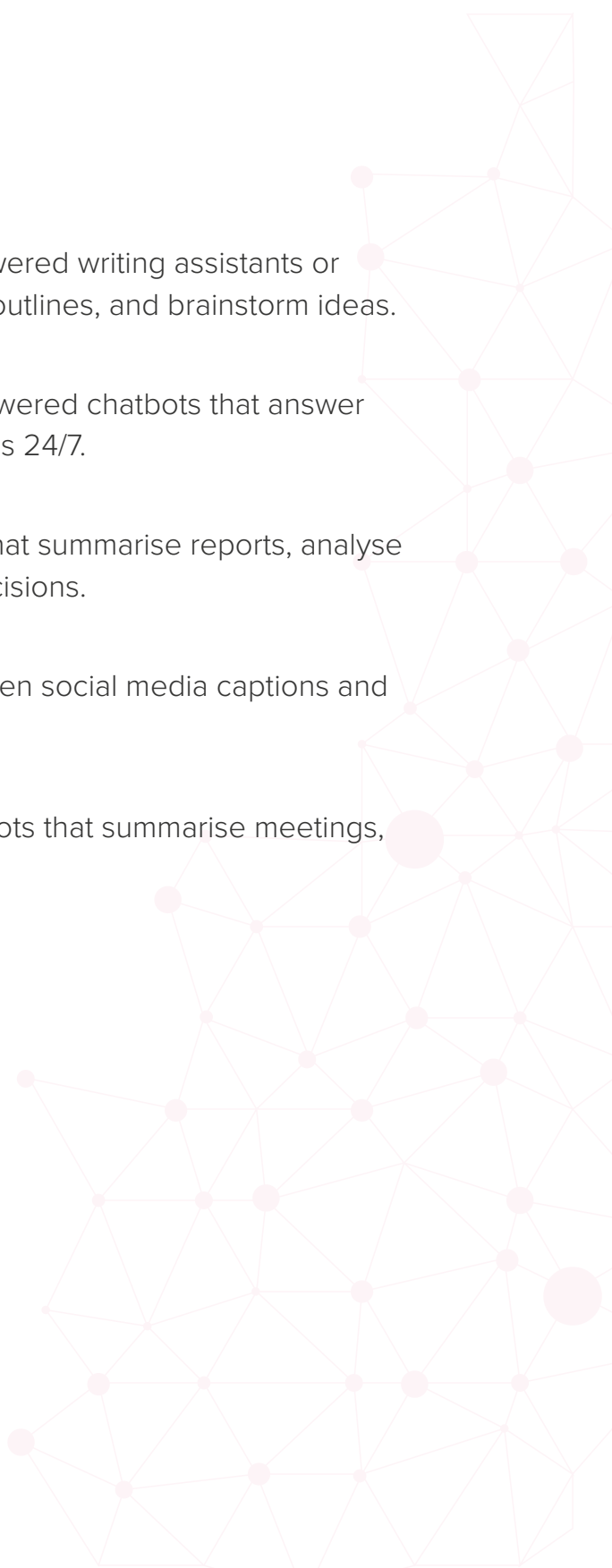## Learn more about AI on the Get Savvy Podcast

AI isn't just about saving time, it's about **reducing manual effort**, improving accuracy, and freeing up your team to **focus on higher-value work**. The right AI tools can **streamline operations**, remove bottlenecks, and give you **consistent, scalable** results in areas like content creation, customer service, and data processing.

Where to focus: Think about where your team is spending the most time on repetitive, low-value tasks - things like drafting emails, answering the same client enquiries, or pulling reports. **That's your sweet spot for AI.**

Review the list below and pinpoint the areas that feel clunky or manual. Start by testing AI in just one of those spots. You'll be surprised how quickly it can reduce the grind and free you up for higher-value work.

Create content faster by using AI-powered writing assistants or custom bots to draft blog posts, email outlines, and brainstorm ideas.

Customer support – Implement AI-powered chatbots that answer FAQs, qualify leads, or manage inquiries 24/7.

Turn data into insights with AI tools that summarise reports, analyse trends, and help you make smarter decisions.

Marketing support – Generate AI-driven social media captions and automate post scheduling.

Enhance internal processes with AI bots that summarise meetings, transcribe calls, or generate reports.

Are you ready to move on?

✔ You have tested AI in **key areas** of your business and are seeing efficiency gains.

✔ AI tools are **saving time** without creating extra work or complexity.

✔ You have customised your AI tools (e.g., trained a bot or GPT) to **understand your business**, brand, and tone of voice.

✔ You are confident about where AI **adds value** without replacing essential human input.

If you're NOT ready:

✘ **Start small.** Try AI for a single task like generating email drafts or summarising reports before expanding its role.

✘ **Refine AI-generated outputs.** AI is powerful, but it still benefits from human oversight - adjust and improve results where needed.

✘ **Learn from experience.** Track how AI impacts your workflow and adjust where necessary.

Action step

Pick one AI-powered tool and implement it in your workflow this week - whether it's for content, customer service, or internal operations.
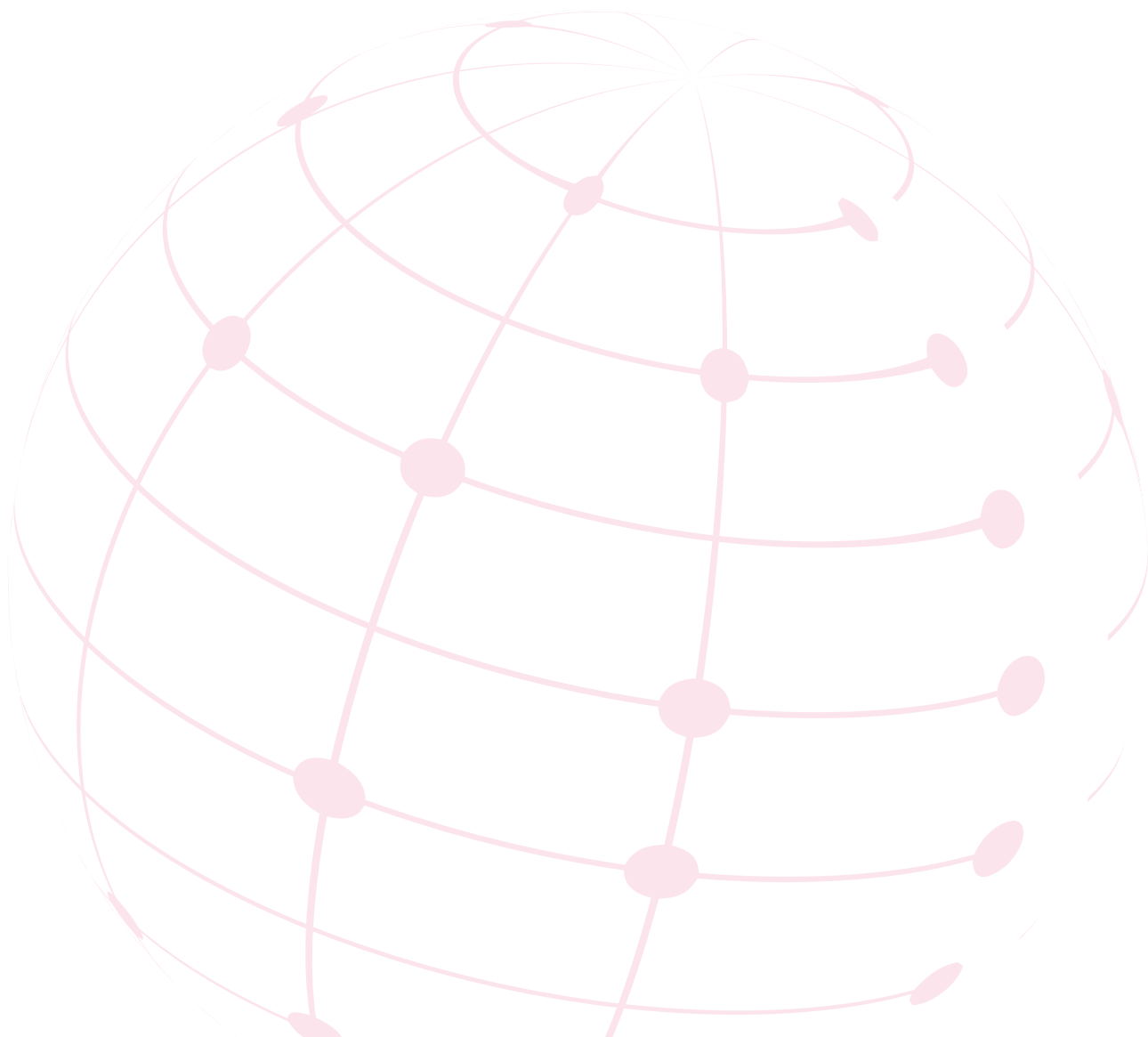
STAGE 5:
Scale with digital teams

AI isn't just here to assist, it's evolving to take on bigger roles in business operations. Right now, most AI tools require human oversight, but **fully autonomous AI teams are on the horizon**. The businesses that start preparing now will have a competitive edge, while those who wait risk falling behind when the technology becomes mainstream.

Why this matters now

The shift to AI-powered digital teams isn't a question of if - it's when. Right now, AI is handling admin, decision-making, and even creative tasks, and it's only getting better. **Companies that understand and experiment with AI today will be in a far stronger position when advanced AI systems become widely accessible.**
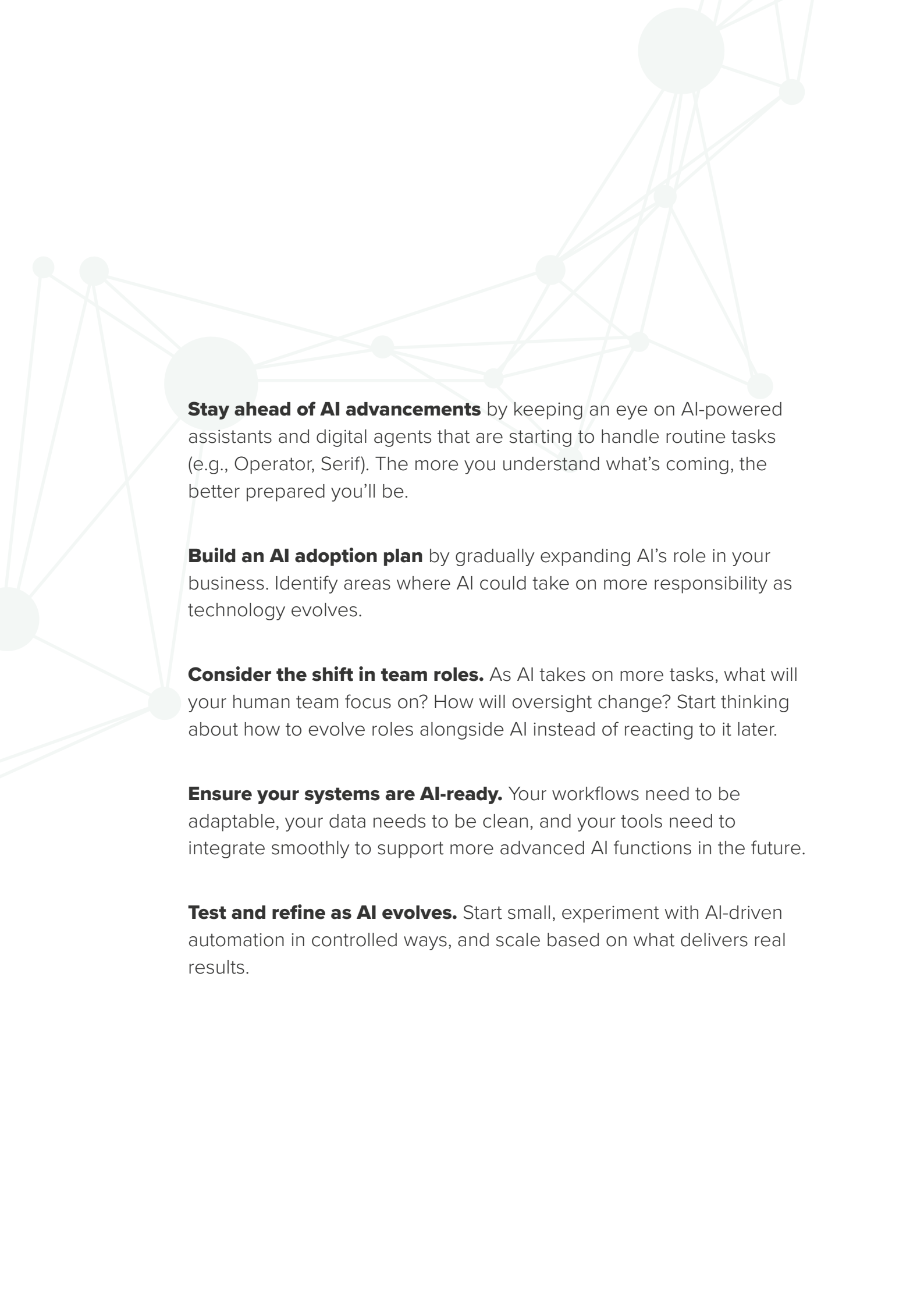
Where to focus: Zoom out and think long-term. **AI is evolving fast and the businesses that start preparing now will be the ones leading later.**

Look at where AI is already showing up in your industry. Then ask: **where could we gradually hand off more responsibility to AI?** Start sketching out a plan for how your tools, team, and systems will need to adapt as AI becomes more capable.

This stage is about staying ahead, not scrambling to catch up.
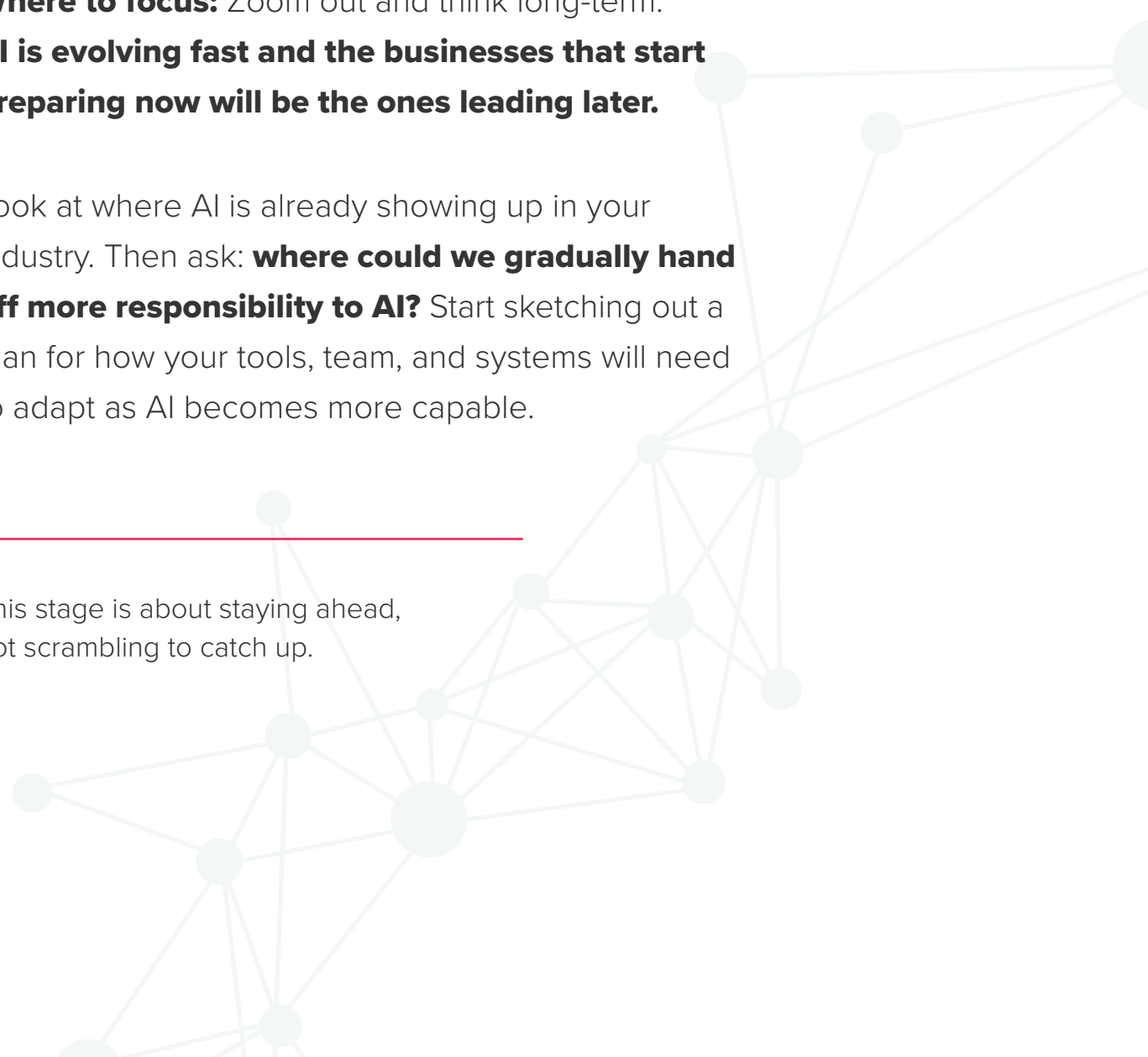
Stay ahead of AI advancements by keeping an eye on AI-powered assistants and digital agents that are starting to handle routine tasks (e.g., Operator, Serif). The more you understand what's coming, the better prepared you'll be.

Build an AI adoption plan by gradually expanding AI's role in your business. Identify areas where AI could take on more responsibility as technology evolves.

Consider the shift in team roles. As AI takes on more tasks, what will your human team focus on? How will oversight change? Start thinking about how to evolve roles alongside AI instead of reacting to it later.

Ensure your systems are AI-ready. Your workflows need to be adaptable, your data needs to be clean, and your tools need to integrate smoothly to support more advanced AI functions in the future.

Test and refine as AI evolves. Start small, experiment with AI-driven automation in controlled ways, and scale based on what delivers real results.

Are you ready?

✔ You have a **clear understanding of where AI is heading** and how it could reshape your industry.

✔ Your business is set up to **integrate AI advancements** as they emerge.

✔ You have a roadmap for **gradually adopting AI-driven automation** and decision-making tools.

If you're NOT ready:

✘ **Refine AI's role.** Identify repetitive tasks AI can handle now and start small.

✘ **Strengthen your existing workflows.** Ensure your business systems are streamlined so AI can enhance, not complicate, your operations.

✘ **Increase AI confidence.** Start with low-risk AI tasks before scaling up to more advanced automation.

Action step

Outline a simple AI roadmap. Identify where AI could take on more responsibility in your business and start preparing for the next wave of AI evolution.

This stage isn't about adopting AI just because it exists, it's about **future-proofing your business** so when AI-powered digital teams become widely accessible, you're not scrambling to catch up, you're already ahead.
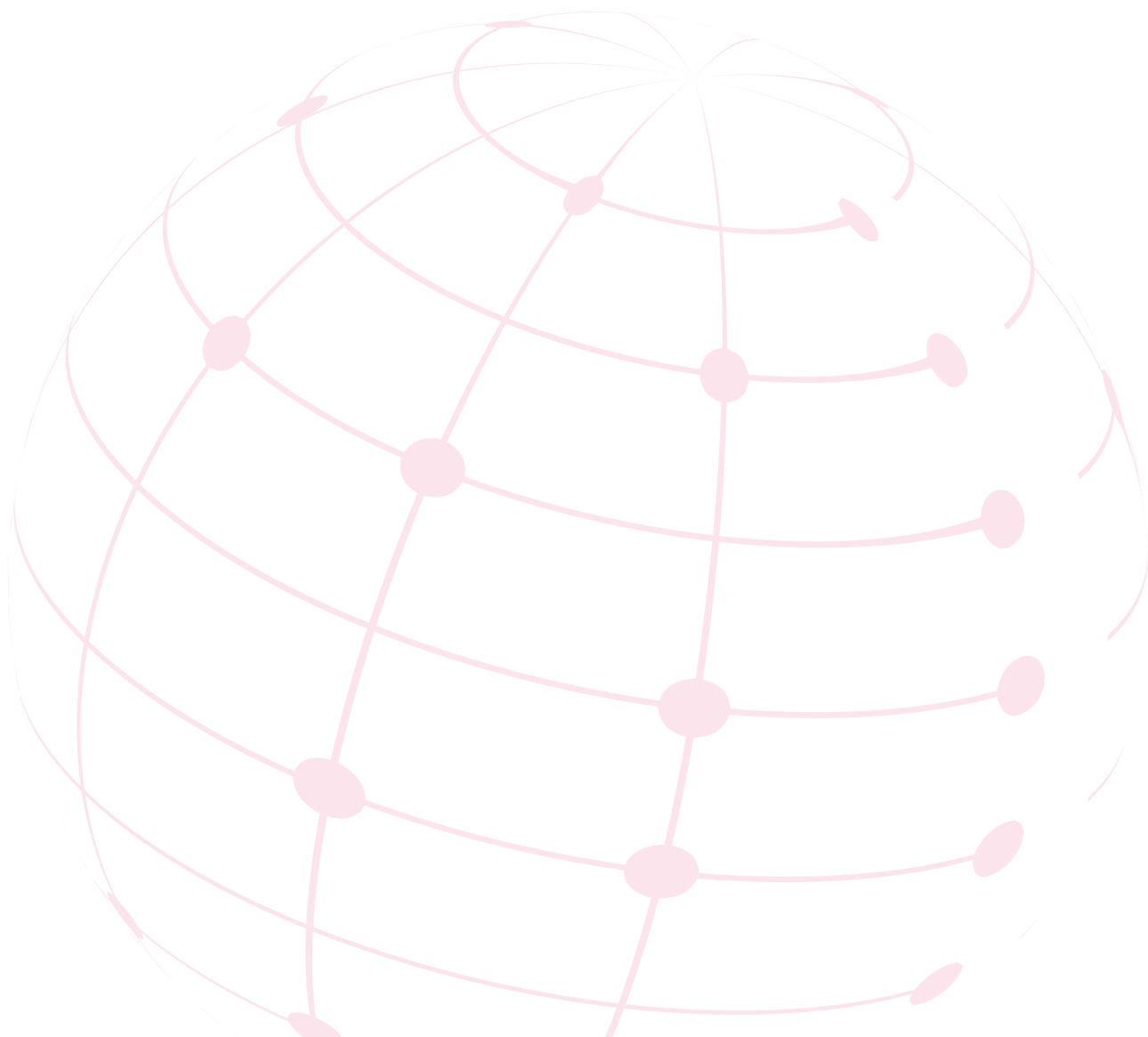
What's next?

No matter what stage you're at - getting your systems sorted, automating tasks, or starting to experiment with AI - **you're already moving in the right direction.**

The businesses that will thrive in the next few years aren't the ones chasing shiny tools. They're the ones building solid systems, integrating smart workflows, and using AI to scale with clarity - not chaos.

That's exactly what **The Savvy AI Framework** helps you do.

It gives you the roadmap - but you don't have to walk it alone.

We help business owners at every stage of this journey:

- Getting your tools and processes working together
- Eliminating time-wasting tasks
- Rolling out AI in a way that actually makes sense for your business
- Setting you up for a digital team that can scale with you

You've seen what's possible. Now imagine having someone walk you through it step by step.
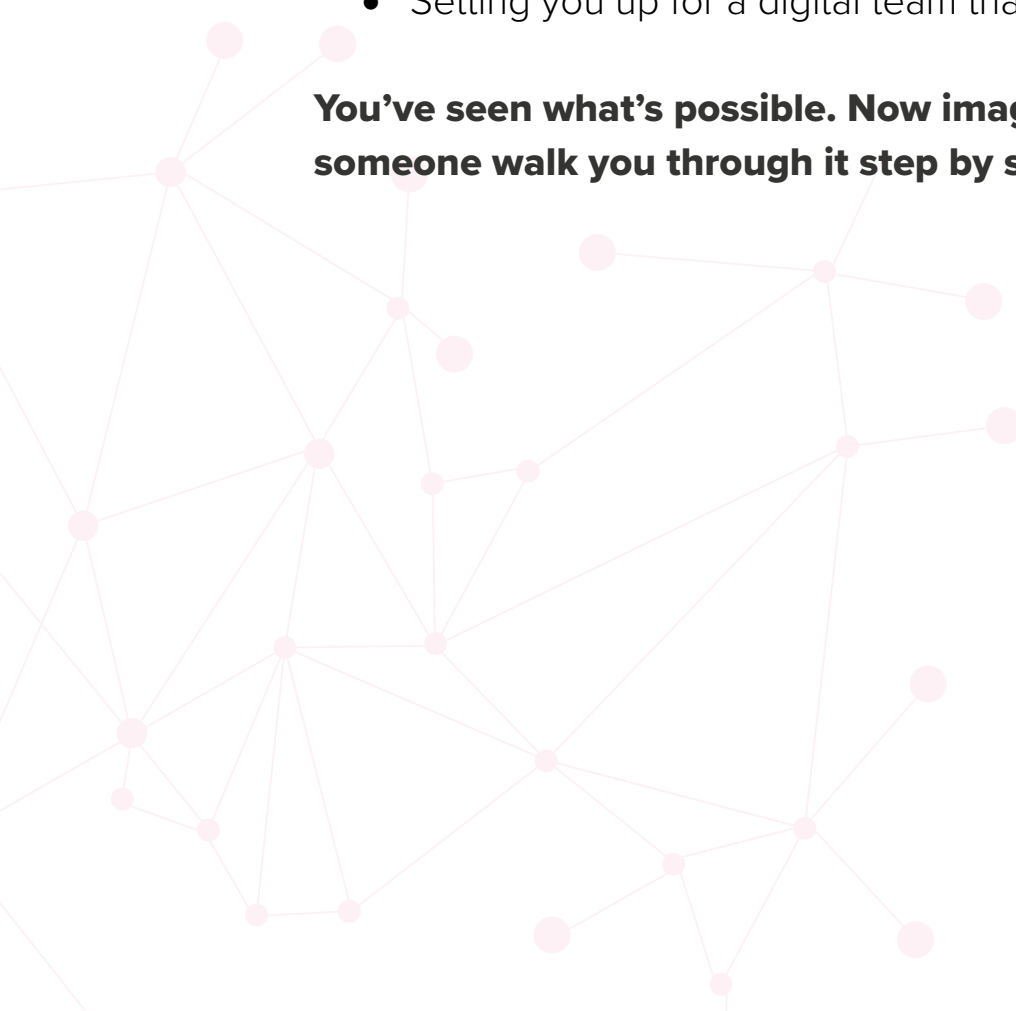
Book a chat with Brenna to get clear on where you are, what's holding you back, and the smartest way to bring AI into your business.

This isn't just a tech upgrade. It's the starting point for a business that runs smoother, grows faster, and gives you back your time.