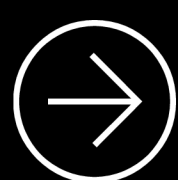


# 90 Days to AI Mastery

## Automate Your Local Business Like a Pro!



PART1: KICKSTART YOUR  
TRANSFORMATION—PREPARE AND  
PLAN (DAYS 1-15)







# The Author

HELLO THERE! I'M COLIN

I'm Colin Lewis, the founder of WingMate. Over the years, I've had the privilege of working closely with countless small and local businesses.

I've seen firsthand the dedication, hard work, and passion that you pour into your businesses every single day. I also understand the challenges you face—wearing multiple hats, juggling countless tasks, and always striving to provide the best service to your customers.

One thing that has become increasingly clear is the transformative power of technology, especially AI and automation. But I know that for many small business owners, the idea of implementing AI can feel overwhelming, complicated, and out of reach. Questions like "Where do I even start?" or "Is this really something I can manage?" are all too common.

That's exactly why I wrote this guide

"Automate Like a Pro in 90 Days: An Easy AI Plan for Local Businesses" is designed to demystify AI and automation for you. I wanted to create a resource that breaks down barriers and shows that embracing these tools is not only possible but also practical and highly beneficial for businesses like yours..



In this guide, you'll find:

- **Simple, Actionable Steps:** No tech jargon or complex theories—just straightforward advice that you can apply immediately.
- **Empathy and Understanding:** I've walked in your shoes and understand the unique challenges you face. This guide is tailored specifically to address those.
- **Encouragement and Support:** You're not alone on this journey. Consider this guide as a friendly companion, cheering you on every step of the way.

### Why I Believe in This Mission

My passion for helping small businesses stems from a simple belief: You deserve access to the same tools and opportunities as larger companies. AI and automation aren't just for the big players—they're for anyone who wants to save time, reduce stress, and grow their business sustainably.

By embracing automation, you can:

- **Reclaim Your Time:** Let AI handle repetitive tasks so you can focus on what truly matters—whether that's strategic planning or spending more time with family.
- **Enhance Customer Satisfaction:** Provide faster, more reliable service that keeps your customers coming back.
- **Stay Competitive:** Keep up with industry trends without getting bogged down by technology.

### What You Can Expect

Over the next 90 days, this guide will walk you through:

- **Understanding Your Current Operations:** We'll start by looking at where you are now, so we can map out where you want to go.
- **Setting Clear, Achievable Goals:** Together, we'll define what success looks like for your business.
- **Implementing AI and Automation:** You'll learn how to choose the right tools and integrate them smoothly into your operations.
- **Engaging Your Team:** I'll share tips on getting your staff excited and onboard with the changes.
- **Measuring Success and Adjusting:** We'll set up ways to track your progress and make tweaks along the way.

### Let's Get Started

I'm genuinely excited for you to embark on this journey. Change can be daunting, but with the right guidance and support, it's absolutely within your reach. Remember, this isn't about overhauling everything overnight—it's about taking manageable steps that lead to significant improvements.

Thank you for trusting me to be part of your business's evolution. Here's to embracing the future, boosting efficiency, and unlocking new possibilities together!

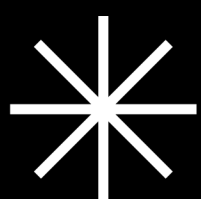
Warm regards,  
Colin Lewis  
Founder of WingMate



FROM OVERWHELMED TO OPTIMIZED: EMBRACE  
AUTOMATION WITH CONFIDENCE

STEP 1.

# Kickstart Your Transformation Prepare and Plan (Days 1-15)



Welcome Aboard: Let's Transform Your  
Business Together





# Step 1

## KICKSTART YOUR TRANSFORMATION PREPARE AND PLAN (DAYS 1-15)

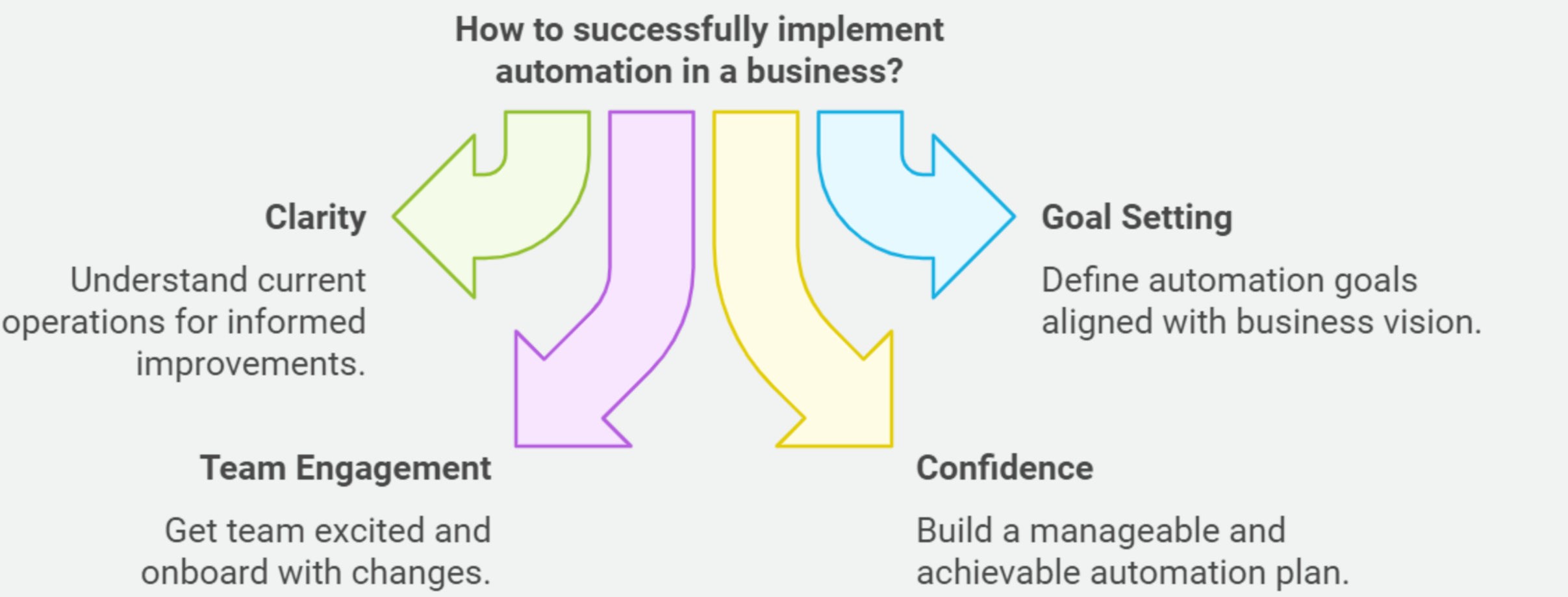
Welcome to the first step of making your business run smoother with the help of AI and automation!

We know that as a small or local business owner, you wear many hats. The idea of introducing advanced technology might seem overwhelming, but we're here to assure you that it's not only possible—it's easier than you might think.

This guide is crafted just for you, with simple, actionable steps that don't require a tech background or big investments. Over the next 15 days, we'll help you lay a solid foundation to make your business more efficient, responsive, and ready for growth.

### WHY THIS STEP MATTERS

- **Clarity:** Understand how your business operates now, so you can make smart improvements.
- **Goal Setting:** Define what you want to achieve with automation, aligning it with your business dreams.
- **Team Engagement:** Get your team excited and onboard with the changes ahead.
- **Confidence:** Build a plan that makes the whole process feel manageable and within reach.







## Your 15-Day Action Plan

### Week 1: Understand and Analyze (Days 1-7)

- Review How Things Work Now List Customer Contact Methods: Write down all the ways customers reach out—phone, email, text, website, social media.
- Map Out Your Processes:
  - Incoming Messages: How do you handle customer inquiries from the moment they come in?
  - Scheduling Appointments: What steps do you take to book and confirm appointments?
  - Follow-ups: How do you check in with customers after a service?
- Spot Challenges:
  - Are there delays in responding to customers?
  - Do you sometimes miss messages or double-book appointments?
  - What tools or software are you currently using?
- Talk to Your Team and Customers Chat with Your Employees:
  - Hold Casual Meetings: Discuss daily tasks and any hurdles they face.
  - Ask for Ideas: Your team might have great suggestions for improvement.
- Reach Out to Customers:
  - Create a Simple Survey: Use tools like Google Forms or SurveyMonkey.
  - Key Questions:
    - How easy was it to schedule with us?
    - How satisfied are you with our communication?
    - Any suggestions for making your experience better?
  - Offer a Thank You: Consider a small discount or a chance to win a gift card for participating.
- Set Clear Goals for Automation Define What You Want to Achieve:
  - Be specific—like "Reduce missed calls by 50%" or "Increase online bookings by 30%."





# Your 15-Day Action Plan

- Make Goals Measurable:
  - Assign numbers and deadlines so you can track progress.
- Prioritize Your Goals:
  - Decide which goals will have the biggest impact and focus on those first.

the great work you've already done.

- Empower Your Team: Involving your employees boosts morale and makes the transition smoother.
- Delight Your Customers: Improved communication and scheduling lead to happier customers and more referrals.
- Focus on Growth: Automation frees up your time to focus on what you love—growing your business.

## Ready to Get Started?

By dedicating the next 15 days to preparation and planning, you're setting yourself up for long-term success. This isn't just about new technology; it's about making your business work better for you, your team, and your customers.

Let's take the first step together!



REMEMBER, YOU'RE NOT ALONE ON THIS JOURNEY. USE THE WORKSHEETS PROVIDED, LEAN ON YOUR TEAM, AND DON'T HESITATE TO REACH OUT IF YOU NEED SUPPORT. TOGETHER, WE'LL MAKE YOUR AUTOMATION GOALS A REALITY.



Detailed Action Steps for Days 1-15

Week 1: Understand and Analyze

Step 1: Review Your Current Operations

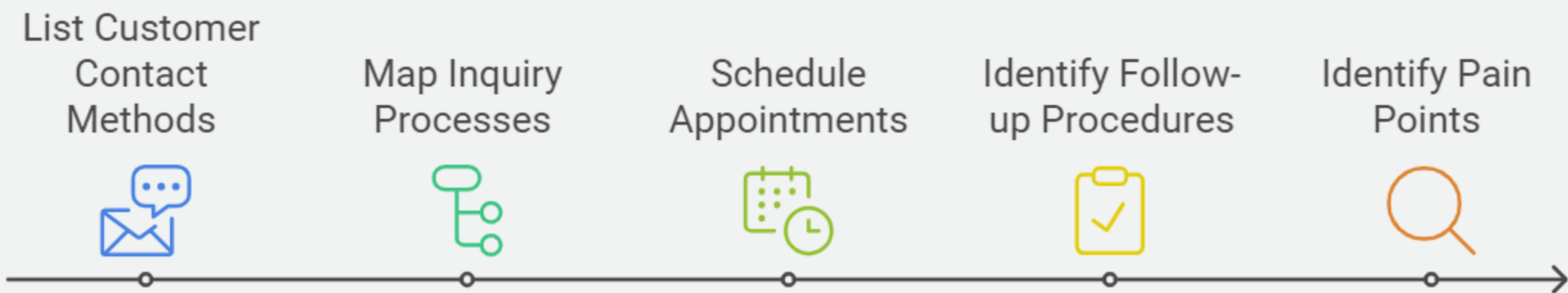
Purpose: To see where you are now so you can decide where to go next.

Action Items:

- List All Customer Contact Methods:
  - Phone calls
  - Emails
  - Text messages
  - Website inquiries
  - Social media messages
- Map Your Processes:
  - Draw a simple flowchart of how inquiries come in and are handled.
  - Note how appointments are scheduled and confirmed.
  - Identify any follow-up procedures after a service is completed.
- Identify Pain Points:
  - Where do delays happen?
  - Are there any repetitive tasks that take up a lot of time?
  - Do you receive customer complaints about communication or scheduling?

Outcome: A clear picture of your current operations and areas that could benefit from automation.

Customer Interaction and Process Mapping







Step 2: Talk to Your Team and Customers

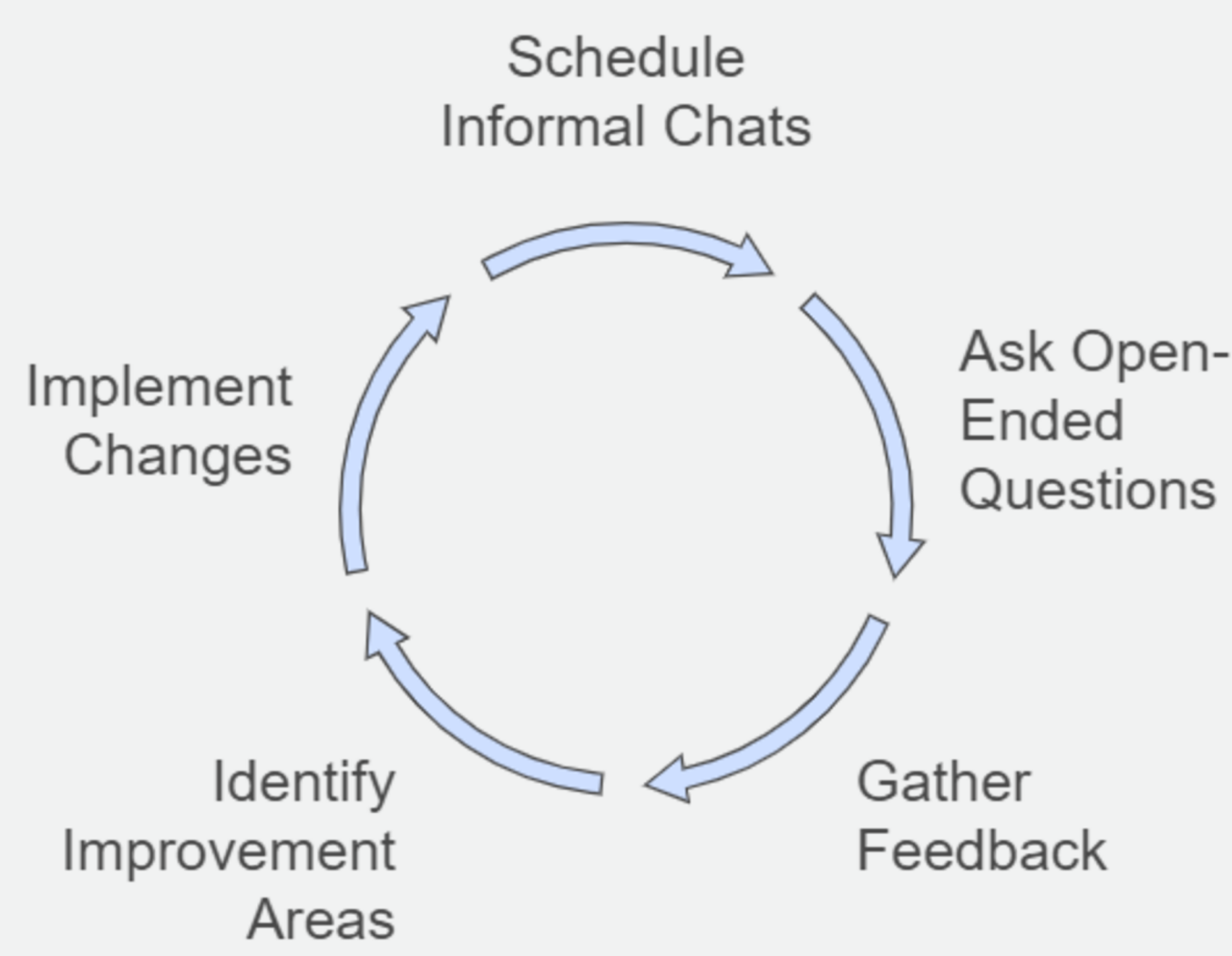
Purpose: To gather insights and ideas from the people who interact with your business daily.

Action Items:

- Team Conversations:
  - Schedule Informal Chats: Grab coffee or have a quick meeting.
  - Ask Open-Ended Questions:
    - What challenges do you face daily?
    - What tasks do you think could be improved?
    - How do you feel about using new tools to help with your work?
- Customer Feedback:
  - Create a Simple Survey:
    - Keep it short—3 to 5 questions.
    - Use friendly language.
  - Distribute the Survey:
    - Send via email.
    - Share on social media.
    - Hand out printed copies if you see customers in person.
  - Offer an Incentive:
    - A small discount or a chance to win a prize can boost participation.

Outcome: Valuable feedback that highlights what's working well and what could be better.

Team Conversations for Continuous Improvement





Step 3: Set Your Automation Goals

Purpose: To focus your efforts on what matters most.

Action Items:

- Define Clear Goals:
  - Example: "Respond to all customer inquiries within 1 hour."
  - Example: "Reduce appointment no-shows by 25%."
- Make Them Measurable:
  - Attach numbers and deadlines.
- Prioritize:
  - Rank your goals by importance and impact.

Outcome: A set of specific goals to guide your automation journey.

Steps to Effective Automation







Week 2: Plan and Prepare

Step 4: Find the Right Automation Tools

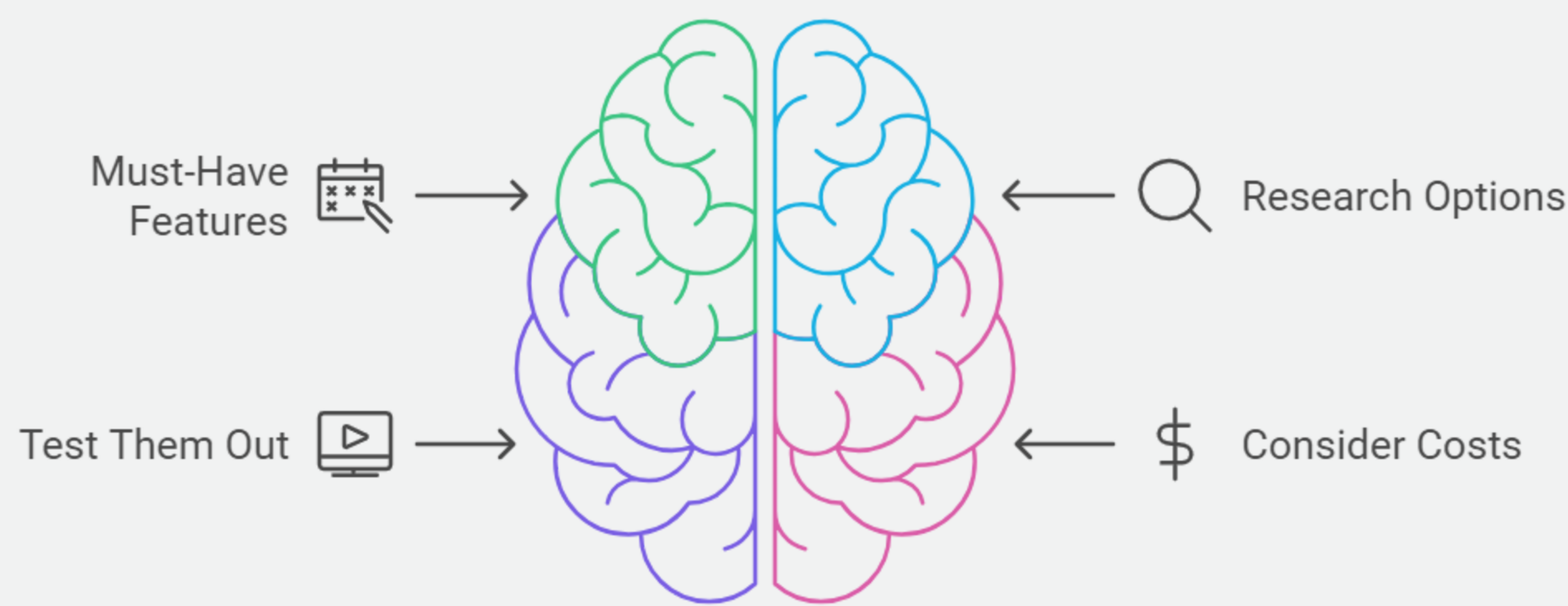
Purpose: To choose tools that will help you achieve your goals without unnecessary complexity.

Action Items:

- Identify Must-Have Features:
  - Easy appointment scheduling
  - Automated reminders
  - Customer messaging
- Research Options:
  - Look for platforms known for being user-friendly.
  - Read reviews from other small business owners.
- Test Them Out:
  - Sign up for free trials.
  - See how easy they are to use.
- Consider Costs:
  - Look for transparent pricing.
  - Ensure it fits within your budget.

Outcome: Selection of an automation tool that feels right for your business.

Comprehensive Guide to Automation Tool Selection





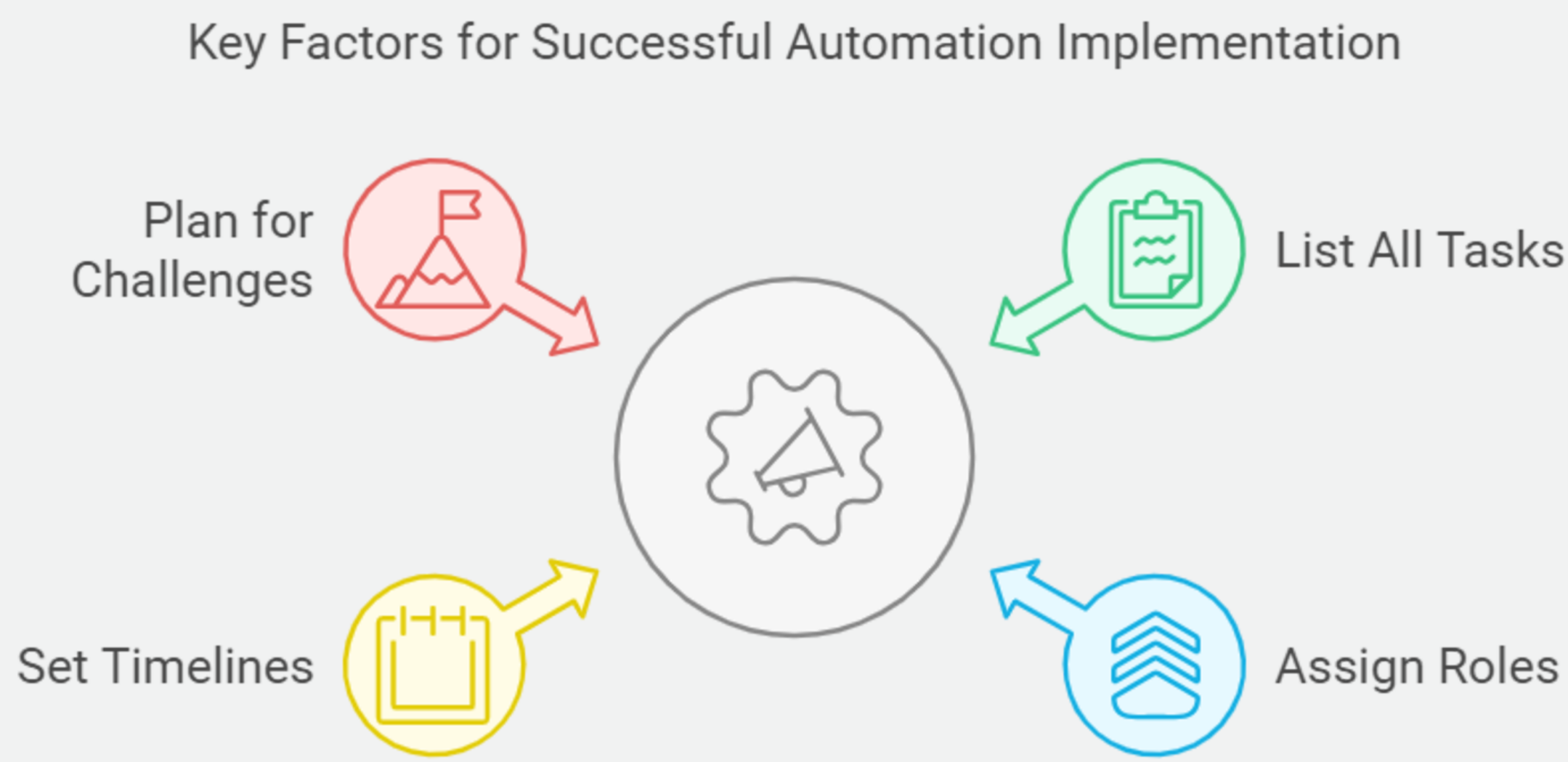
Step 5: Create Your Implementation Plan

Purpose: To map out how you'll put everything into action.

Action Items:

- List All Tasks:
  - Setting up the software
  - Importing customer contacts
  - Training your team
- Assign Roles:
  - Decide who will handle each task.
- Set Timelines:
  - Be realistic with deadlines.
- Plan for Challenges:
  - Identify potential obstacles.
  - Think of solutions in advance.

Outcome: A clear roadmap that guides you through setting up your new system.







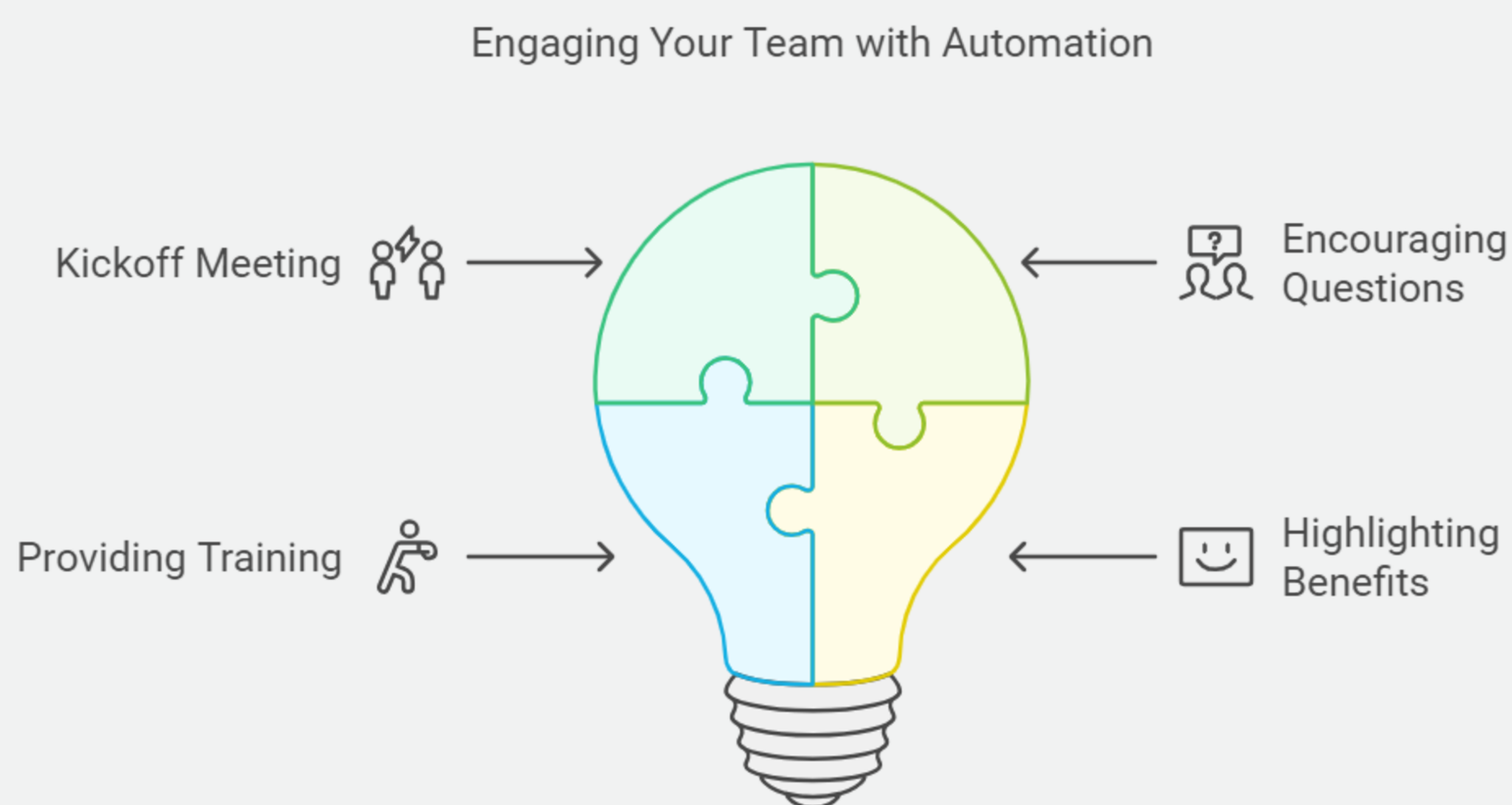
Step 6: Get Your Team Onboard

Purpose: To ensure everyone is ready and willing to embrace the changes.

Action Items:

- Hold a Kickoff Meeting:
  - Share your goals and the benefits of automation.
  - Show a demo of the new tool if possible.
- Encourage Questions:
  - Create a safe space for team members to express concerns.
- Provide Training:
  - Schedule time for team members to learn the new system.
  - Offer support and resources.
- Highlight the Benefits:
  - Less repetitive work
  - Better customer interactions
  - More time for meaningful tasks

Outcome: A team that's informed, enthusiastic, and ready to move forward.







### Extra Tips for Success

- Keep Communication Open: Regular updates help keep everyone on the same page.
- Celebrate Small Wins: Acknowledge progress to maintain momentum.
- Stay Flexible: Be ready to adjust your plan as you learn what works best.

### Moving Forward

By the end of these 15 days, you'll have:

- A clear understanding of your current operations.
- Defined goals for what you want to achieve.
- Chosen the right tools for your business.
- A step-by-step plan to implement automation.
- A team that's ready and excited to embrace new ways of working.

You're well on your way to making your business more efficient and your customers happier.

Next up is putting your plan into action!

Let's keep the momentum going!

Remember, every big journey starts with a single step. You're making smart moves toward a brighter future for your business. You've got this!







Dear Reader,

Thank you for taking the time to explore "Automate Like a Pro in 90 Days: An Easy AI Plan for Local Businesses." I hope this guide has sparked ideas and shown you that embracing AI and automation is both achievable and beneficial for your business.

**My Personal Invitation**

I'd like to personally invite you to take the next step. My team and I at WingMate are here to support you in bringing these plans to life. We can work together to tailor solutions that fit your unique needs and ensure a smooth implementation.

**Let's Connect**

If you're ready to transform your business or simply have questions, I'd love to chat with you.

Please book a call with me:

Schedule a Call with Colin Lewis (Insert your booking link)

You can also reach out directly:

- Email: colin@wingmatelocal.com
- Phone: (555) 123-4567 (Insert your actual contact information)

Let's make AI & automation work for you.

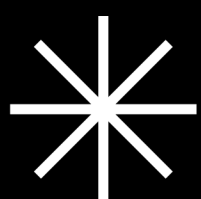
Warm regards,

Colin Lewis

Founder of WingMate



# Worksheets for Phase 1:



To assist you in executing Phase 1 effectively, We've created a set of worksheets corresponding to each step. These worksheets are designed to guide you through the actions, help document your findings, and keep track of progress. You can use them digitally or print them out for team meetings and discussions.





Worksheet 1: Unleash Your Business Potential

Purpose: Discover where your business shines and identify areas for growth.

Section 1: Map Your Customer Connections

Table 1: Communication Channels Inventory

Google Sheet Link:

[https://docs.google.com/spreadsheets/d/1oFj4\\_wMFfQeHe9UkwBf3ibXlbiknvYxnmmYU-jk4eWY/edit?usp=sharing](https://docs.google.com/spreadsheets/d/1oFj4_wMFfQeHe9UkwBf3ibXlbiknvYxnmmYU-jk4eWY/edit?usp=sharing)

Section 1: Map Your Customer Connections

Table 1: Communication Channels Inventory

Channel	Tools You're Using	Average Response Time	What Works Well	Opportunities for Improvement
Phone Calls				
Emails				
Text Messages				
Website Forms				
Social Media				
Others (Specify)				

Action Item: Fill in each row with the relevant information about your communication channels.

Table 2: Visualize Your Processes

Since process mapping is best done with flowcharts, you might consider creating a spreadsheet tab where you list steps in your process sequentially.

Google Sheet Link:

<https://docs.google.com/spreadsheets/d/1-xsXNsboxEFbs9Yi6DYuWYldjBKwlRuWjn5zh-jjQ4RQ/edit?usp=sharing>

Process Step	Description	Notes
Step 1: Incoming Inquiry		
Step 2: Response		
Step 3: Scheduling		
Step 4: Confirmation		
Step 5: Service Delivery		
Step 6: Follow-Up		
...		

**Action Item:** List each step in your customer interaction process and provide descriptions and any notes.





Table 3: Identify Growth Opportunities

Google Sheet Link:

[https://docs.google.com/spreadsheets/d/1hhDqldvz1ZnVyXloPc\\_rpop693e5rldZ2NBkC1cqzYk/edit?usp=sharing](https://docs.google.com/spreadsheets/d/1hhDqldvz1ZnVyXloPc_rpop693e5rldZ2NBkC1cqzYk/edit?usp=sharing)

Area of Opportunity	Current Challenge	Idea to Improve	Potential Benefit

**Action Item:** Identify areas where you can improve and brainstorm ideas.

Section 2: Embrace Scheduling Success

Table 4: Highlight Your Booking Methods

Google Sheet Link:

[https://docs.google.com/spreadsheets/d/1J8M2HREwOG6-9VTU\\_CHxae0AZkYv56mKF7xOlzeA8Cc/edit?usp=sharing](https://docs.google.com/spreadsheets/d/1J8M2HREwOG6-9VTU_CHxae0AZkYv56mKF7xOlzeA8Cc/edit?usp=sharing)

Booking Method	Tools You're Using	% of Total Bookings	What's Working Great	How We Can Improve
Phone				
Email				
In-Person				
Online Booking				
Third-Party Apps				
Others (Specify)				

**Action Item:** Fill in the booking methods you use and analyze their effectiveness.

Table 5: Describe Your Scheduling Journey

Since this is descriptive, you can create a table outlining each step.

Google Sheet Link:

<https://docs.google.com/spreadsheets/d/1zUSZU3aBByaW5Xj6KoRD6QCpKlFIhbPK0sWYSm7U9-s/edit?usp=sharing>

Scheduling Step	Description	Notes
Initial Contact		
Appointment Scheduling		
Confirmation Sent		
Reminder Sent		
Service Delivery		
Follow-Up		

**Action Item:** Describe each step in your scheduling process.



Section 3: Dream Big

Table 6: Top 5 Areas for Growth

Google Sheet Link:

<https://docs.google.com/spreadsheets/d/1pXHA25s-hDL7SWgvUS-fWBMeg62F6P6Sy-aylkmNWlE/edit?usp=sharing>

Priority	Area for Growth	Ideas to Elevate	Exciting Possibilities
1			
2			
3			
4			
5			

**Action Item:** List and prioritize areas for growth and brainstorm ideas.

Worksheet 2: Connect and Thrive with Your Team and Customers

Purpose: Gather insights from your team and customers to fuel positive changes.

Section 1: Team Triumphs and Aspirations

Table 7: Team Feedback Summary

Google Sheet Link:

[https://docs.google.com/spreadsheets/d/1hXuzGDmTw\\_CtJUkelQxDgQ1fv\\_XjFUIXfoPcTZ8J44w/edit?usp=sharing](https://docs.google.com/spreadsheets/d/1hXuzGDmTw_CtJUkelQxDgQ1fv_XjFUIXfoPcTZ8J44w/edit?usp=sharing)

Common Themes	Number of Mentions	Notes
What We Love		
Our Big Ideas		
Excitement About the Future		

**Action Item:** Collect feedback from team members.

Table 8: Anonymous Team Inspirations (Summary)

Google Sheet Link:

<https://docs.google.com/spreadsheets/d/1qvEl229xa3jie2lCzuwXIXjbl4dllEKsy-ZgAJuseQA/edit?usp=sharing>

Name	Role	One Thing They Love About Their Job	Ideas for Improvement

**Action Item:** Summarize anonymous feedback.

Section 2: Customer Joy and Feedback



Table 9: Customer Happiness Survey Results

Question	Positive Feedback Highlights	Areas for Improvement
How satisfied are you with our service?		
What did you love about scheduling with us?		
How can we make your experience even better?		

Action Item: Summarize survey responses.

Section 3: Action Plan for Growth

Table 10: Turning Insights into Action

Insight	Action Steps	Potential Positive Impact

Action Item: Develop action plans based on feedback.

Worksheet 3: Set Inspiring Goals for a Brighter Future

Purpose: Define achievable goals to propel your business forward.

Section 1: Craft Your Vision (SMART Goals)

Table 11: SMART Goals

Goal Description	Specific	Measurable	Achievable	Relevant	Time-bound
Goal 1					
Goal 2					
Goal 3					

Action Item: Define your SMART goals.

Section 2: Prioritize Your Path to Success

Table 12: Impact vs. Effort Matrix

You can create a table to help prioritize.

Goal	Impact (High/Medium/Low)	Effort (High/Medium/Low)	Priority
Goal 1			
Goal 2			
Goal 3			

Action Item: Assess and prioritize your goals.





Section 3: Bring Your Goals to Life

Table 13: Goal Action Plan

Goal Milestone Target Date Responsible Person

Goal	Milestone	Target Date	Responsible Person

Action Item: Plan the steps to achieve each goal.

Section 4: Align with Your Dreams

Table 14: Alignment with Business Vision

Business Dream Supporting Goal

Business Dream	Supporting Goal

Action Item: Ensure your goals align with your overall vision.

Worksheet 4: Choose the Perfect Tools to Empower Your Business

Purpose: Find AI and automation tools that suit your needs.

Section 1: Envision Your Ideal Tool

Table 15: Must-Have and Nice-to-Have Features

Feature Must-Have (Yes/No) Nice-to-Have (Yes/No)

Feature 1

Feature 2

Feature 3

Action Item: List and categorize desired features.

Section 2: Explore Your Options

Table 16: Tool Comparison

Tool Name Meets Must-Haves? (Yes/No) Offers Nice Bonuses? (Yes/No) First Impressions Notes

Tool A

Tool B

Tool C

Action Item: Evaluate potential tools.



**Section 4:** Make Your Empowered Choice

**Table 18: Pros and Cons**

Tool Name	Pros	Cons
Tool A		
Tool B		
Tool C		

**Action Item:** Weigh the pros and cons to make your selection.

**Worksheet 5:** Create Your Exciting Action Plan

Purpose: Design a step-by-step plan to implement your chosen tools.

**Section 1:** Plot Your Journey

**Table 19: Project Timeline**

Phase	Start Date	End Date	Milestones
Setup and Discovery			
Integration and Testing			
Team Training and Empowerment			
Grand Launch			

Action Item: Define phases and set dates.

**Section 2:** Rally Your Dream Team

**Table 20: Project Team Roles**

Role Name	Responsibilities	Contact Info
Project Champion		
Tech Wizard		
Operations Guru		
Training Star		
Support Ally		

**Action Item:** Assign team roles.

**Section 3:** Gather Your Resources

**Table 21: Budget for Success**

Investment Area	Estimated Cost	Notes
Software		
Equipment		
Team Development		
Contingency Fund		
Total Investment		

**Action Item:** Plan your budget.





**Section 4: Provide Empowering Resources**  
**Table 28: Resources Provided**

Resource Type Description Availability Date  
Quick-Start Guides  
Training Sessions  
Q&A Channels

**Action Item:** Plan and provide necessary resources.

**Section 5: Keep the Energy High**  
**Table 29: Motivation Boosters**

Initiative Description Responsible Person  
Recognition Programs Shout-outs, badges, rewards HR Manager  
Team Challenges Friendly competitions Team Leads  
Success Wall Share and celebrate wins Office Manager

**Action Item:** Implement motivational initiatives.

