

THE 3 PILLARS OF AUTOMATION

SALES

OPS

ADMIN

*Automate the boring stuff
so humans can do the valuable stuff*

SALES

Outbound → Inbound → Nurture → Sales Call

Top Automations

- Instant SMS response to inbound form fills
- Call reminders + follow ups
- Nurture sequences for no-show leads
- Custom proposal + contract generator

PROSPECT

Hi John, it's Corey with HANDLBAR - got your message on the site regarding the pavers. I'm just wrapping up a job and will give you a call here shortly!

Corey Berg
HANDLBAR Solutions

CB >

SALES TEAM

New website form submission!

Name: John Doe
Phone: [239-999-9999](tel:239-999-9999)
Comments:
Looking for quote on having my pavers sealed by end of next week

Stats

391% increase in sales conversions when leads are contacted within 60 seconds
- [Velocify](#)

78% of customers buy from the company that responds to their inquiry first
- [Lead Connect](#)

⅔ of buyers expect a response within 10 minutes to any marketing, sales, or customer service inquiry
- [HubSpot](#)

OPS

Onboarding → Fulfillment → Delivery

Top Automations

- Onboarding forms (Welcome messages, portal access, introduction video)
- Auto-create tasks/projects + cloud folders
- Auto-send milestone updates
- File/document requests triggered by status

Key results after implementing automation were 48% improvement in productivity, and 42% decrease in operating costs
- [Sapio Research](#)

Over 90% of customers feel that the companies they buy from 'could do better' when it comes to onboarding
- [Wyzowl](#)

ADMIN

Invoices → Payment → Reporting

Top Automations

- Auto-send invoices + payment reminders
- Auto-saving documents to cloud folders
- Live updating reporting dashboards

Workers could save an average of 122 hours annually through AI-powered admin task automation
- [Reuters](#)

