

The AI Automation Starter Kit

A free one-page workflow planner, readiness checklist, and five starter workflow blueprints for small businesses.

Free from AI Ops Foundry. Use it alongside the video [5 Business Tasks You Can Automate With AI Today](#).

Part 1 · Readiness checklist

Tick every box before you build:

- ☐ I picked **one** task that happens at least weekly.
- ☐ I can describe the rules in a few sentences, as if training a new employee.
- ☐ I know which app the work **starts** in (trigger) and which app it **ends** in (action).
- ☐ I've defined what happens when the AI is **unsure** (an "other" or "needs review" path).
- ☐ The first version will **draft only**; a person approves anything customer-facing.
- ☐ I checked my AI provider's data-handling policy for the data involved.
- ☐ I collected **10–20 real past examples** to test with.
- ☐ I set a **monthly spending limit** with my AI provider.
- ☐ I know where the **log** lives (a spreadsheet tab is fine).

Part 2 · One-page workflow planner

Field	Your answer
Workflow name	
Task it replaces	
How often it happens	
1. Trigger (what starts it?)	
2. AI step (classify / summarize / extract / draft)	
AI instruction (one paragraph)	
Required output format	
3. Rules & review (what runs automatically, what waits for a person?)	
"Unsure" path	
4. Action (where does the result go?)	
5. Log (where is each run recorded?)	
Test set location (10–20 examples)	
Success criteria after two weeks	

Part 3 · Five starter blueprints

Blueprint A · Email triage with reply drafts

- **Trigger:** new email in inbox
- **AI step:** classify as sales / support / billing / other; one-sentence reason
- **Rules:** never auto-send; "other" gets no draft

- **Action:** apply label; save draft reply for sales and support
- **Log:** sheet row with timestamp, sender domain, category, reason

Blueprint B · Meeting notes to tasks

- **Trigger:** new document in a "Meeting Notes" folder
- **AI step:** extract a JSON list of `{task, owner, due_date}`
- **Rules:** items with no owner are flagged, not assigned
- **Action:** create tasks in your project tool; email a summary to attendees
- **Log:** sheet row per meeting with task count and flagged count

Blueprint C · Weekly business report

- **Trigger:** schedule, Mondays 7:00 AM
- **Step:** spreadsheet formulas calculate week-over-week changes (no AI)
- **AI step:** write a 5-sentence plain-English summary of the calculated results
- **Rules:** the summary may only reference numbers present in the input
- **Action:** email the report to the owner
- **Log:** sheet tab "Report history"

Blueprint D · Grounded FAQ answers

- **Trigger:** new question from a contact form or support inbox
- **AI step:** answer **only** from the approved FAQ document; otherwise reply "not covered"
- **Rules:** "not covered" answers go to a person; no pricing or refund answers
- **Action:** save draft reply; for "not covered", create a support task
- **Log:** sheet row with question, answered/not covered, FAQ section used

Blueprint E · Lead intake and follow-up

- **Trigger:** website form submission

- **AI step:** summarize the request; match it to your service list and criteria
- **Rules:** leads outside criteria are tagged "review," not rejected
- **Action:** add to CRM or sheet; notify owner; save drafted follow-up email
- **Log:** the CRM/sheet record itself

Part 4 · Testing log template

#	Input (short description)	Expected result	AI result	Match?	Fix applied
1					
2					
3					

Part 5 · Five rules to remember

1. The AI drafts; a person sends (at first).
2. Formulas do math; AI explains it.
3. Every category list needs an "other."
4. Test on real past examples before going live.
5. Log every run.

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