

Workflow Blueprints

Step-by-Step Templates for Intake, Content & Follow-Up

Most small businesses don't lack effort — they lack a repeatable process. These three blueprints lay out the steps that actually happen in three common workflows, flag which steps are usually worth automating, and give you a place to map your own version. They're a starting structure, not a finished system — your business will skip some steps and add others, and that's fine.

WHAT'S INSIDE

INTAKE BLUEPRINT

From first inquiry to a scheduled, qualified conversation.

CONTENT BLUEPRINT

From idea to published, repurposed content.

FOLLOW-UP BLUEPRINT

From first conversation to long-term relationship.

HOW TO READ EACH BLUEPRINT

MANUAL — usually stays human-run, at least for now

AUTOMATE — a common candidate for AI or automation

Each blueprint also includes a "Where Automation Fits Best" summary and a blank table so you can map the steps to how your business actually runs today before changing anything.

WHY THESE THREE

Intake, content, and follow-up aren't the only workflows a business runs — but they're three of the most common places things quietly fall apart: leads go unanswered, content stalls before it ever gets published, and people who showed real interest never hear from you again. Fixing any one of these tends to pay off faster than a more ambitious overhaul.

BLUEPRINT 1 OF 3

Intake Workflow

Goal: Turn a new inquiry into a qualified, scheduled conversation — without anything slipping through the cracks.

1 Inquiry Received

A new lead reaches out through your website form, email, phone, or a social media DM.

MANUAL — VARIES

2 Instant Acknowledgment

They get a reply confirming you received it and what happens next — ideally within minutes, not days.

AUTOMATE

3 Qualification Questions

A short set of questions (budget, timeline, need) sorts real opportunities from poor fits before you spend time on a call.

AUTOMATE

4 Scheduling

Once qualified, they book a specific time directly on your calendar instead of a back-and-forth email thread.

AUTOMATE

5 Pre-Call Prep Sent

A short reminder plus any intake form or questions you want answered before you talk.

AUTOMATE

6 The Conversation

You run the actual call or meeting — this is the one step that should stay fully human.

MANUAL

BLUEPRINT 1 OF 3

Intake Workflow, continued

WHERE AUTOMATION FITS BEST

Almost everything before the actual conversation. Instant acknowledgment, qualification questions, scheduling links, and pre-call reminders can all run without you touching them — which means the only thing landing on your calendar is a conversation worth having.

MAP THIS TO YOUR BUSINESS

STEP	WHO/WHAT HANDLES IT NOW	TIME IT TAKES NOW
Inquiry Received		
Instant Acknowledgment		
Qualification Questions		
Scheduling		
Pre-Call Prep Sent		
The Conversation		

NOTES

BLUEPRINT 2 OF 3

Content Workflow

Goal: Get from "we should post something" to published content without starting from a blank page every time.

1 Idea Capture

Ideas get written down the moment they occur — a running list, not a memory you hope to keep.

MANUAL

2 First Draft

The idea becomes an actual draft — an outline, a post, or a script — instead of staying a note forever.

AUTOMATE

3 Review & Edit

A human pass for accuracy, tone, and brand fit before anything goes out the door.

MANUAL

4 Format for Channel

The same core message gets adapted for blog, social, or email — different length, different tone, same idea.

AUTOMATE

5 Schedule & Publish

Content goes out on a calendar instead of whenever you happen to remember.

AUTOMATE

6 Repurpose

One piece of content becomes several — a thread, a caption set, a newsletter blurb — instead of a one-time use.

AUTOMATE

BLUEPRINT 2 OF 3

Content Workflow, continued

WHERE AUTOMATION FITS BEST

First drafts, channel formatting, and repurposing are the fastest wins — they're mechanical translation work, not creative judgment calls. If you want ready-made prompts for these exact steps, see the Prompt Library Sampler's Content Prompts section.

MAP THIS TO YOUR BUSINESS

STEP	WHO/WHAT HANDLES IT NOW	TIME IT TAKES NOW
Idea Capture		
First Draft		
Review & Edit		
Format for Channel		
Schedule & Publish		
Repurpose		

NOTES

BLUEPRINT 3 OF 3

Follow-Up Workflow

Goal: Make sure no lead or client falls through the cracks after the first conversation.

1

Immediate Recap

A short summary and next steps go out within hours of the call, while it's still fresh for both of you.

AUTOMATE

2

Decision-Window Check-In

If there's no response within a few days, a low-pressure follow-up goes out automatically.

AUTOMATE

3

Long-Term Nurture

People who weren't ready yet stay on a list and hear from you occasionally instead of disappearing entirely.

AUTOMATE

4

Post-Delivery Check-In

After a project or sale wraps up, a check-in confirms everything actually landed well.

AUTOMATE

5

Review or Referral Ask

At the right moment — not too soon — you ask for a review or an introduction. The timing trigger can be automated; the actual ask still reads better coming from you.

MANUAL TOUCH

BLUEPRINT 3 OF 3

Follow-Up Workflow, continued

WHERE AUTOMATION FITS BEST

Nearly the entire follow-up workflow. This is usually the highest-leverage place to start automating, because it's where businesses lose the most opportunities through simple forgetting — not bad service, just nobody following up on time.

MAP THIS TO YOUR BUSINESS

STEP	WHO/WHAT HANDLES IT NOW	TIME IT TAKES NOW
Immediate Recap		
Decision-Window Check-In		
Long-Term Nurture		
Post-Delivery Check-In		
Review or Referral Ask		

NOTES

BEFORE YOU GO

Putting These to Work

A few honest notes on actually using these blueprints, not just reading them.

- **Start with one workflow.** Trying to automate intake, content, and follow-up all at once usually means none of them get finished.
- **Fix the process before you automate it.** Automating a broken step just makes the mistake happen faster.
- **Some steps should stay manual.** The "Manual" tags aren't a failure to optimize — some moments genuinely need a human.
- **Your version will look different.** These are starting structures. Add, remove, or reorder steps until it matches how your business actually works.

QUICK RECAP

INTAKE (PAGES 2-3)

Inquiry to scheduled, qualified conversation.

CONTENT (PAGES 4-5)

Idea to published, repurposed content.

FOLLOW-UP (PAGES 6-7)

First conversation to long-term relationship.

NEXT STEP

Want this mapped to your actual business?

These blueprints show the shape of the process. A short conversation can confirm which steps you actually have, where the gaps are, and what's realistic to automate first.

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