FRAN MURAD

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EXECUTION MANUAL

Automate your business with AI

How to spot what to automate, connect your tools without coding and add AI to inquiries, forms, bookings, customer follow-up and the tasks you repeat every day.

WRITTEN BY

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The tools, prices and plans mentioned reflect the time of publication and may change. Always check the current terms on each tool's official website before signing up. Appendix D lists the official links.

This material is educational: it teaches work processes and the judgment to apply them. It does not guarantee sales, clients or financial results: those depend on execution, the market and each person's effort. It is not a substitute for professional legal, accounting or tax advice.

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INTRODUCTION

Before you start

Who this book is for, what you'll have when you finish it and the warning about automation almost nobody gives.

Every day, in millions of small businesses, someone copies a piece of data from a message into a spreadsheet, answers the same question for the fifth time, sends a reminder by hand or forgets to follow up. None of those tasks needs a person. All of them can be automated.

Automation sounds like something for big companies, with programmers and expensive systems. Not anymore. With tools that don't require coding, many of them free or low-cost, an entrepreneur can make their business answer inquiries, record data, confirm bookings, follow up and deliver products without manual intervention. And with AI, those automations can also understand messages, classify information and draft replies.

This book teaches you to do it with judgment: what to automate first, with which tool, how to build it so it doesn't break and where it's worth keeping a person involved.

Who it's for

- Entrepreneurs and small business owners who feel they spend the day answering messages and doing admin tasks.
- Independent professionals who want to spend more time on their work and less on management.
- Those who offer digital services and want to add automations to what they sell.

You don't need to know how to code. You need to be able to describe clearly how your business works, which is exactly what you'll practice in Part I.

What you'll have when you finish

- [ ] An audit of your tasks, with the ten that give you back the most time if you automate them.
- [ ] A map of the tools you need and what each one is for.
- [ ] Automatic replies to the most frequent inquiries.
- [ ] Forms that send data where you need it on their own.
- [ ] A booking system with confirmations and reminders.
- [ ] Customer follow-up that doesn't depend on your memory.
- [ ] Repetitive tasks handled with AI: classifying, summarizing, drafting.
- [ ] Payments and deliveries that work even while you sleep.
- [ ] A method for building, testing and maintaining each automation.

How it's organized

Part I is before automating: what it is, what's worth automating and with which tools.

Part II covers the automations, in six areas: inquiries, forms, bookings, follow-up, tasks with AI, and payments and deliveries.

Part III is doing it right: building, testing and maintaining, and the limits and risks.

At the end there are four annexes: the audit template, fifteen ready-to-build automation recipes, the prompts and the sources.

The warning

Automating a disorganized process doesn't organize it: it disorganizes it faster. If today you're not clear on how you answer an inquiry, when you follow up or

what data you need from a customer, automating it will just multiply the mess. That's why this book starts by understanding and organizing, and only then automates.

> **AUTOMATING THE RELATIONSHIP**
>
> Some things are worth keeping human: the conversation with a customer about to make an important decision, the reply to a complaint, attention for someone who's distressed. A business that automates everything loses what often sets it apart: the personal touch. The goal isn't to remove people from the business. It's to remove them from the tasks that don't need a person, so they have more time for the ones that do.

About the tools

This book mentions specific tools (WhatsApp Business, Google Forms, Zapier, Make and others) because they're the most widely used and help make the examples clear. But tools change: names, prices, plans and features. That's why the book first explains **what** needs to be achieved and then **with what** it can be achieved today. If a tool disappears or changes, the logic still holds. Annex D gathers the official links to check what's current.

> **BEFORE YOU TURN THE PAGE**
>
> For the next three days, write down every repetitive task you do in your business: what it is, how many times a day and how long it takes you. Don't filter: everything that repeats. That list is the raw material for chapter 2.

01

What automating is

The structure every automation has, the difference between automating with rules and with AI, and a simple criterion for knowing what's worth leaving in a person's hands.

Every automation, from the simplest to the most complex, has the same shape: when something happens, do this. If you can describe a task that way, it can probably be automated.

The basic structure

An automation has two parts:

PART	WHAT IT IS	EXAMPLES
Trigger	What sets it in motion	A message arrives, someone fills in a form, a booking date approaches, a payment comes in
Actions	What happens next, in order	Reply, save data in a spreadsheet, send an email, notify you, create a task

Some examples in one line:

- **When** someone writes to your WhatsApp for the first time, **send** a welcome message with your hours and catalog.
- **When** someone fills in the contact form, **save** their details in a spreadsheet, **send them** a confirmation email and **notify me** on my phone.

- **When** a booking is one day away, **send** a reminder with the option to confirm or cancel.
- **When** a payment comes in, **send** the digital product by email.

> **DESCRIBE BEFORE YOU BUILD**
>
> The most useful exercise before automating anything is to write the task in this form: “When [trigger], do [action 1], then [action 2]...” If you can't write it that way, you don't understand the task well yet, and no tool will be able to automate it.

Conditions

Many automations need to make decisions: if one thing happens, do this; if another happens, do that. That's called a **condition**:

> *__When__ someone fills in the form, __if__ they chose “quote,” send them the email with the price list and notify me; __if__ they chose “general inquiry,” send them the email with the FAQ.*

Conditions let a single automation handle different situations without you stepping in.

Rules or AI

There are two broad ways to automate, and it's worth knowing when to use each one:

	WITH RULES	WITH AI
How it works	Does exactly what you told it, always the same way	Interprets, classifies or generates text
Example	If the form says “quote,” send email A	Read a free-form message and decide whether it's a price inquiry, a complaint or a booking
Advantage	Predictable, reliable, cheap	Handles messy information, free text, varied cases
Risk	Doesn't adapt to the unexpected	Can get things wrong or make things up
When to use it	When information arrives organized and the decision is clear	When information arrives as free text and needs to be understood

THE GOLDEN RULE

If a task can be automated with rules, automate it with rules. They're cheaper, more predictable and easier to fix when something fails. Use AI only in the step that really needs it: understanding free text, summarizing, classifying or drafting. Chapter 8 shows how to combine them.

What's worth automating

The best candidates have several of these traits:

- [ ] They repeat many times a week.
- [ ] They're always done the same way, or in a few ways.
- [ ] They don't require judgment or empathy to be done well.
- [ ] If they're forgotten or done late, they cost money or customers.
- [ ] Today they consume time you could spend on something else.

WHERE TO START

Automations 1, 2, 3 and 4 can be up and running in a day, at no cost, with tools you probably already use. They tend to give back the most time relative to the effort. If you don't have any, start there.

Organize before automating

Before automating a task, make sure it's organized:

- [ ] Do you know exactly what steps it has?
- [ ] Do you know what information you need at each step and where it comes from?
- [ ] Are you clear on what happens in exceptional cases?
- [ ] Are the replies or messages that will be sent written and reviewed?
- [ ] Do you know where the information needs to be recorded?

If the answer to any of these is “no,” sort it out first. A good practice is to do the task by hand, following the written steps, two or three times before automating it.

FIND MY AUTOMATIONS AUDIT

Here's the list of repetitive tasks in my business, with how many times a week I do them and how long they take: **list**.

My business: **brief description**. The tools I already use: **WhatsApp Business, Google, Instagram, etc.**.

For each task: tell me whether it can be automated with rules, with AI or whether it should stay manual, and why. Order them by the time they'd save me. For the first five, describe the automation in the form "When [trigger], do [actions]," and what type of tool would be needed. Don't recommend paid tools if there's a free option that's enough.