

AUTOMATION SETUP GUIDE

Build the systems that enforce your boundaries so you don't have to police them.

Every manual task is a place a boundary can slip. Automate protection: booking, deposits, intake, scope, response times.

Manual Labor Audit

List the repetitive tasks you do manually each week that drain time and invite boundary slips.

The 7 Protective Systems

1. BOOKING & SCHEDULING

Components

- Available hours only
- Buffer time between calls
- Auto-confirmations & reminders
- No after-hours slots

How I'll build it / which tool

2. PAYMENT & DEPOSITS

Components

- Deposit required to start
- Auto-invoicing
- Stated late-payment terms
- Auto-receipts

How I'll build it / which tool

3. INTAKE & QUALIFICATION

Components

- Intake form that screens fit
- Red-flag questions
- Auto-reply with working style
- Discovery-call gate

How I'll build it / which tool

4. CONTRACTS & SCOPE

Components

- Standard contract template
- Scope document
- Revision policy stated
- E-sign before work

How I'll build it / which tool

5. COMMUNICATION & RESPONSE TIME

Components

- Stated response window
- Auto-responder with hours
- One channel for client comms
- Office-hours boundary

How I'll build it / which tool

6. PROJECT DELIVERY

Components

- Templated workflow
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- Milestone check-ins
- Handoff checklist
- Feedback request automation

How I'll build it / which tool

7. OFFBOARDING & FOLLOW-UP

Components

- Closeout email
- Testimonial request
- Referral ask
- Re-engagement sequence

How I'll build it / which tool

Priority Build List

Decide when each system gets built.

Timeframe	System to build
This week	
This month	
Next 90 days	
Eventually	

Gaps & Accountability

The biggest automation gap exposing me right now.

Who or what will hold me accountable to building it?

