E EMPIRE BUILDER ACADEMY

MODULE 08

AUTOMATE AND SCALE

8 lessons with step-by-step instructions, copy-and-paste AI prompts, exercises, a worksheet, an action checklist, and a knowledge check.

THE ONLINE ENTREPRENEUR BLUEPRINT

From Zero to Your First Online Business

08

BUILD SMART. LAUNCH FAST. SCALE WITH AI.

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MODULE 8: AUTOMATE AND SCALE

MODULE OVERVIEW: Once your business has customers and repeatable activities, the next challenge is doing more without burning out. This module shows you how to build AI-powered workflows, automate routine processes, use email marketing, keep customers coming back, document systems, hire contractors responsibly, track revenue and expenses, and measure performance so your decisions are based on data. Scaling isn't about doing everything faster; it's about building a business that runs on systems rather than on your memory and willpower.

In this module:

- Lesson 8.1: AI-Powered Workflows
- Lesson 8.2: Business Process Automation
- Lesson 8.3: Email Marketing
- Lesson 8.4: Customer Retention
- Lesson 8.5: Building Systems
- Lesson 8.6: Hiring Contractors
- Lesson 8.7: Tracking Revenue and Expenses
- Lesson 8.8: Measuring Business Performance

> **NOTE:** Contractor classification, payroll, and tax topics in this module are general education only, not legal or tax advice. Rules vary by state. Check IRS.gov, DOL.gov, and your state labor department, and consult a professional for your situation.

LESSON 8.1

AI-Powered Workflows

The Big Idea

In Module 3 you learned to use AI as an assistant. Now you'll **embed AI into recurring workflows** so that it supports your business every week. The goal is consistent output with less effort, while you stay in control of quality and decisions.

The Workflow Stack

1. **Inputs:** where information comes from (forms, emails, notes, sales data).
2. **AI processing:** summarize, draft, classify, or analyze using saved prompts or custom assistants.
3. **Human review:** approve, edit, or reject.
4. **Outputs:** send, publish, file, or update a record.
5. **Feedback loop:** improve prompts based on what you had to fix.

High-Value AI Workflows for Small Businesses

Workflow	Input	AI step	Output
Weekly content	Idea list, customer questions	Draft posts in brand voice	Scheduled posts
Inquiry replies	New inquiry	Draft reply from FAQ and pricing	Reviewed, sent email
Meeting notes	Call notes or transcript (with consent)	Summarize + action items	Client recap email + task list
Proposals	Discovery notes	Draft proposal from template	Reviewed proposal
Review responses	New reviews	Draft responses	Posted replies
Monthly report	Sales and marketing numbers	Summarize trends and suggest actions	Owner dashboard notes

Build a "Prompt Library"

Create a document (or spreadsheet) where you store every prompt that works well, with:

- Name and purpose
- The prompt text
- Required inputs
- Example output

- Last updated date and notes

This becomes a business asset. A future contractor can use it, too.

Guardrails for AI Workflows

- Keep a human review step for anything customer-facing.
- Don't feed sensitive personal data into tools without understanding their data handling.
- If you record calls for AI notes, get consent (some states require all parties to consent to recording).
- Spot-check AI outputs regularly, even when they've been reliable.

> **EXAMPLE (HYPOTHETICAL):** A hypothetical virtual assistant agency creates a "client recap" workflow. After each client call, she pastes her notes into a saved prompt that produces a summary, decisions, action items with owners, and a draft recap email. She reviews, edits, and sends within an hour of each call, which clients appreciate.

AI Prompt: Build a Prompt Library Entry

COPY-AND-PASTE AI PROMPT

```
Turn this prompt that worked well for me into a reusable prompt
library entry. Include: a name, purpose, when to use it, required
inputs (as [PLACEHOLDERS]), the improved prompt text, a quality
checklist for reviewing the output, and common fixes.
My prompt: [PASTE]
```

AI Prompt: Meeting Notes to Action Items

COPY-AND-PASTE AI PROMPT

```
Here are my notes from a call with [CLIENT/PROSPECT] about [TOPIC]:
[PASTE NOTES]
Produce: (1) a 5-bullet summary, (2) decisions made, (3) action items
with owner and due date, (4) open questions, and (5) a short,
friendly recap email to send them. Don't add anything not in the notes.
```

> **EXERCISE 8.1:** Identify three workflows to enhance with AI. Create prompt library entries for each and test them for one week.

LESSON 8.2

Business Process Automation

The Big Idea

Business process automation uses software to perform tasks automatically when certain events happen. No-code tools (e.g., Zapier, Make, and built-in automations in many apps) connect your apps so information moves without manual copying.

The Trigger-Action Model

Every automation follows a simple pattern:

- **Trigger:** something happens ("a new form is submitted").
- **Action(s):** something is done automatically ("add a row to a spreadsheet," "send an email," "create a task").
- **Filters/conditions (optional):** only run when certain criteria are met.

Starter Automations

1. **New lead → CRM/spreadsheet + notification:** every form submission is logged and you get an alert.
2. **New booking → confirmation + reminder:** scheduling tools send confirmations and reminders automatically.
3. **New purchase → welcome email + onboarding:** customers receive next steps immediately.
4. **Invoice overdue → reminder email.**
5. **New email subscriber → welcome sequence** (Lesson 8.3).
6. **New review → notification** so you respond quickly.
7. **Weekly → summary report** of new leads and sales.

Automation Safety Checklist

- Test with your own data before going live.
- Name automations clearly and document them in a simple list (what, trigger, apps, owner).
- Set error notifications so you know when something breaks.
- Review monthly; apps change and automations can fail silently.
- Avoid automations that could send wrong or duplicate messages to customers without review.
- Know which accounts hold customer data and secure them with strong passwords and two-factor authentication.

EXAMPLE (HYPOTHETICAL): A hypothetical tutoring business automates: new booking form → student added to a spreadsheet → confirmation email with session details → calendar event created → reminder email 24 hours before the session. The owner receives a daily summary instead of handling each step manually.

AI Prompt: Automation Blueprint

COPY-AND-PASTE AI PROMPT

I want to automate this process: [DESCRIBE STEPS I DO MANUALLY]. Apps I use: [LIST]. Create an automation blueprint with: trigger, filters, each action step, data fields mapped between apps, error handling, and a testing plan. Explain it for a beginner using a no-code tool. Flag any step that should keep human review.

AI Prompt: Automation Inventory

COPY-AND-PASTE AI PROMPT

Here's a list of automations I've set up: [LIST]. Create an automation inventory table with columns: name, purpose, trigger, apps involved, data touched (flag personal data), owner, how to test, and last checked date. Suggest which ones are most risky if they fail and how to monitor them.

EXERCISE 8.2: Build one starter automation, test it with your own information, and add it to your automation inventory on the worksheet.

LESSON 8.3

Email Marketing

The Big Idea

Your **email list** is one of the few marketing channels you own. Social media platforms control who sees your posts; with email, you can reach people who chose to hear from you. Email marketing supports nurturing leads, launching offers, and keeping customers engaged.

Building Your List (Ethically)

- Only add people who **opted in** (lead magnet, newsletter signup, checkout with consent).
- Never buy email lists.
- Be clear about what subscribers will receive and how often.
- Follow the **CAN-SPAM Act:** accurate header information, non-deceptive subject lines, identify ads where required, include your physical postal address, provide a clear opt-out, and honor opt-outs promptly (within 10 business days). See FTC.gov.
- If you have subscribers outside the U.S., other laws (like Canada's CASL or the EU's GDPR) may apply.

Essential Email Types

1. **Welcome sequence:** automated series for new subscribers (Module 6).
2. **Newsletter:** regular helpful content (weekly, biweekly, or monthly).
3. **Promotional emails:** launches, new products, real limited-time offers.
4. **Transactional emails:** receipts, confirmations, shipping updates.
5. **Re-engagement:** to inactive subscribers.
6. **Post-purchase:** onboarding, tips, review requests, cross-sells.

A Simple Newsletter Format

- **Subject line:** clear and interesting, not misleading.
- **Opening:** one personal or relevant line.
- **Main value:** one tip, story, or insight.
- **Optional quick links:** new post, product, event.
- **Call to action:** one primary action.
- **Sign-off.**

Key Email Metrics

- **Open rate:** an imperfect metric, because some email apps' privacy features can affect how opens are recorded. Use it as a rough signal only.

- **Click rate:** clicks ÷ emails delivered. Often more meaningful.
- **Conversion:** purchases or bookings from email.
- **Unsubscribe rate:** watch for spikes after certain emails.
- **List growth:** new subscribers minus unsubscribes.

Segmentation

Group subscribers by interest, behavior, or customer status (e.g., leads vs. customers) and send more relevant emails. Even two segments, "prospects" and "customers," can improve relevance.

> **EXAMPLE (HYPOTHETICAL):** A hypothetical plant shop sends a biweekly newsletter with one seasonal plant care tip, one photo of a new arrival, and a link to the shop. Customers who bought a specific plant receive an automated care-tip email two weeks after delivery.

AI Prompt: Newsletter Generator

COPY-AND-PASTE AI PROMPT

```
Write a newsletter for [BUSINESS] subscribers ([AUDIENCE]).
Main topic: [TOPIC]. One helpful tip or insight, a short personal
opening, one quick link to [LINK DESCRIPTION], and one call to
action: [CTA]. Under 300 words. Give 5 subject line options and
preview text. Honest and non-clickbait.
```

AI Prompt: Launch Email Sequence

COPY-AND-PASTE AI PROMPT

```
Write a 4-email launch sequence for [NEW OFFER] at [PRICE] for my
email list of [AUDIENCE]. Real launch details: [DATES, LIMITS IF
ANY]. Emails: (1) announcement, (2) how it helps + what's included,
(3) FAQ and objections, (4) reminder (mention a deadline only if
real). Each under 250 words with 2 subject line options.
No fake scarcity, no income or results guarantees.
```

AI Prompt: Re-Engagement Email

COPY-AND-PASTE AI PROMPT

```
Write a re-engagement email for subscribers who haven't opened or
clicked in [TIMEFRAME]. Remind them what they signed up for, share
one genuinely useful thing, and give them an easy choice: stay
subscribed or unsubscribe. Friendly, no guilt. Under 150 words.
```

EXERCISE 8.3: Choose an email marketing tool, set up your signup form and welcome sequence, and schedule your first newsletter.

LESSON 8.4

Customer Retention

The Big Idea

Customer retention is keeping customers coming back. Many businesses find that serving existing satisfied customers is less costly than constantly finding new ones, and returning customers often provide referrals and reviews. Retention starts with a great first experience (Module 6) and continues with ongoing value.

Retention Strategies

1. **Excellent delivery:** the foundation of everything.
2. **Onboarding:** help customers get value quickly from what they bought.
3. **Check-ins:** follow up after delivery to ensure satisfaction.
4. **Recurring offers:** subscriptions, maintenance plans, retainers, refills.
5. **Personalization:** remember preferences and history.
6. **Loyalty perks:** thank-you discounts, early access, or bonuses for returning customers (keep them simple and honest).
7. **Helpful content:** newsletters and tips that keep you top of mind.
8. **Win-back campaigns:** reconnect with past customers.
9. **Feedback loops:** ask, listen, improve, and tell customers what you changed.

Retention Metrics

- **Repeat purchase rate:** customers with 2+ purchases ÷ total customers.
- **Churn rate (subscriptions/retainers):** customers who cancel in a period ÷ customers at the start of the period.
- **Customer lifetime value (CLV), simplified:** average order value × average number of purchases per customer over a period. (A rough estimate; use your own data.)

Hypothetical practice example: If average order value is $50 and customers buy an average of 3 times over two years, the simplified CLV over two years is $150.

> **EXAMPLE (HYPOTHETICAL):** A hypothetical lawn-care business sends every customer a "season plan" email in early spring offering a maintenance plan with a fixed monthly price, and a fall reminder about leaf cleanup. Customers who choose the plan get priority scheduling, a perk that costs little to provide but is valuable to them.

AI Prompt: Retention Plan

COPY-AND-PASTE AI PROMPT

My business: [DESCRIPTION]. Customers typically buy [WHAT] [HOW OFTEN]. Create a customer retention plan with: an onboarding sequence, a check-in schedule, 3 recurring offer ideas, a simple loyalty perk, a win-back email for customers who haven't bought in [TIMEFRAME], and the metrics I should track monthly.

AI Prompt: Win-Back Message

COPY-AND-PASTE AI PROMPT

Write a short, personal win-back message (email and text versions) for past customers of [BUSINESS] who last purchased [TIMEFRAME] ago. Mention what's new: [UPDATES]. Offer: [REAL OFFER or "none"]. Under 100 words each. Easy to ignore or opt out; no guilt or pressure. (I'll only text customers who've given consent.)

EXERCISE 8.4: Calculate your repeat purchase rate (or estimate it), and implement one retention strategy this month.

LESSON 8.5

Building Systems

The Big Idea

A **system** is a documented, repeatable way of getting something done. Systems let you deliver consistent quality, take time off, delegate work, and grow. Without systems, the business lives in your head, and you become the bottleneck.

The Core Systems Every Small Business Needs

1. **Marketing system:** how you create and publish content and generate leads.
2. **Sales system:** how you handle inquiries, consultations, proposals, and follow-ups.
3. **Delivery system:** how you fulfill products or services.
4. **Customer support system:** how you handle questions and issues.
5. **Finance system:** invoicing, bookkeeping, tax savings, reporting.
6. **Admin system:** files, passwords, tools, calendar.

How to Document a System (SOP)

1. **Do the task** and record your screen or take notes as you go.
2. **Write the steps** in order, with screenshots or short videos if helpful.
3. **Add checklists** for quality.
4. **Note the tools and logins** needed (store credentials in a password manager, never in the SOP itself).
5. **Test it:** have someone else follow it, or follow it yourself "as a beginner" in a week.
6. **Update it** whenever the process changes.

Your Business Operations Hub

Keep all SOPs, templates, prompts, policies, and automation inventories in one organized place (a shared drive folder, Notion workspace, or similar):

- 01-Marketing
- 02-Sales
- 03-Delivery
- 04-Support
- 05-Finance
- 06-Admin
- 07-Prompt-Library

The Owner's Weekly and Monthly Rhythm

- **Weekly:** review leads, sales, cash, content, and support log (60 minutes).
- **Monthly:** review metrics, update SOPs, check automations, reconcile books, plan next month's priorities.
- **Quarterly:** review goals, pricing, offers, and tools; decide what to start, stop, and continue.

> **EXAMPLE (HYPOTHETICAL):** A hypothetical photographer documents her "wedding delivery system": backup files the same night, cull within 3 days, edit using saved presets, deliver a sneak peek in 7 days, full gallery in 30 days, send a thank-you and review request. Because it's written down, she can later hire an editing contractor and give them a clear process.

AI Prompt: SOP From a Screen Recording Transcript

COPY-AND-PASTE AI PROMPT

```
Here's a transcript (or my rough notes) of me doing [TASK]:
[PASTE]
Turn it into an SOP with: purpose, when to do it, tools needed
(no passwords), numbered steps, screenshots to capture [MARK
WHERE], a quality checklist, common mistakes, and a definition of
done. Write it so a new contractor could follow it.
```

AI Prompt: Systems Gap Analysis

COPY-AND-PASTE AI PROMPT

```
Here's how I currently handle marketing, sales, delivery, support,
finance, and admin in my business: [DESCRIBE EACH].
For each area, rate how systemized it is (1-5), identify the biggest
risk if I were unavailable for two weeks, and recommend the first
SOP to write. Give me a 4-week plan to document my top systems.
```

> **EXERCISE 8.5:** Set up your Operations Hub folders and write SOPs for your two most frequent tasks.

LESSON 8.6

Hiring Contractors

The Big Idea

At some point, your time becomes the limit. Hiring **independent contractors** (freelancers) is a common first step to getting help without becoming an employer. But hiring well, and classifying workers correctly, matters.

What to Delegate First

Delegate tasks that are:

- **Repetitive and documented** (you have an SOP).
- **Outside your strengths** (design, bookkeeping, video editing).
- **Lower-value uses of your time** compared to sales and strategy.

Use a simple exercise: list your weekly tasks, estimate hours, and mark each as "only I can do," "someone else could do with an SOP," or "stop doing."

Contractor vs. Employee

Worker classification is a legal question, not just a preference. The IRS looks at the overall relationship, often grouped into three categories:

- **Behavioral control:** does the business control how the work is done?
- **Financial control:** does the business control the business aspects of the job (payment method, expenses, tools)?
- **Relationship:** are there written contracts, benefits, permanency, and is the work a key aspect of the business?

The U.S. Department of Labor and many states use their own tests (some states use a stricter "ABC test"). Misclassifying employees as contractors can lead to back taxes and penalties. See IRS.gov ("Independent contractor (self-employed) or employee?") and DOL.gov, and consult a professional when unsure.

Paperwork Basics (U.S. Contractors)

- Collect **Form W-9** from U.S. contractors before paying them.
- Issue **Form 1099-NEC** if payments for services meet the IRS reporting threshold for the year (the threshold has changed for recent years; check IRS.gov for the current amount and filing deadlines).
- Use a **written contractor agreement** covering scope, deliverables, deadlines, payment terms, confidentiality, ownership of work (intellectual property assignment), and termination.
- Payments through some third-party platforms may be reported differently; check current IRS guidance.

The Hiring Process

1. **Define the role:** tasks, outcomes, hours or deliverables, budget, timeline.
2. **Write a clear job post** with requirements and how to apply.
3. **Source candidates:** freelance marketplaces, referrals, professional communities.
4. **Screen:** review portfolios and relevant experience.
5. **Paid test project:** a small, real, paid task to evaluate quality and communication.
6. **Agreement:** sign a contractor agreement before work starts.
7. **Onboard:** share SOPs, tools access (limited to what's needed), expectations, and communication norms.
8. **Review:** check work closely at first; give clear feedback.

Protect Your Business

- Give access only to what's needed; use shared/delegated access instead of sharing your passwords.
- Use a password manager with sharing features.
- Remove access promptly when a contract ends.
- Keep ownership of your accounts, domain, and files.

> **EXAMPLE (HYPOTHETICAL):** A hypothetical Etsy shop owner spends hours each week creating product mockups. She documents her process in an SOP, posts a project on a freelance marketplace, pays three finalists for a small test (five mockups each), chooses the best, signs an agreement that assigns ownership of the work to her shop, and shares a folder with only the files needed.

AI Prompt: Write a Contractor Job Post

COPY-AND-PASTE AI PROMPT

```
Write a job post for a freelance [ROLE] for my [BUSINESS].
Tasks: [LIST]. Hours or deliverables per week/month: [DETAILS].
Skills required: [SKILLS]. Tools: [TOOLS]. Budget: [RANGE].
Include: a short business intro, responsibilities, requirements,
a paid test project description, and application instructions that
ask a specific question to filter out generic applicants.
```

AI Prompt: Delegation Audit

COPY-AND-PASTE AI PROMPT

Here's a list of my weekly tasks with hours spent: [LIST].
Classify each as: "only I can do," "delegate with an SOP," "automate," or "stop doing." Estimate hours I could free up and suggest which role to hire first. Note any tasks where worker classification might be a concern so I can check with a professional.

LEGAL NOTICE: Not legal or tax advice. Worker classification rules vary by federal agency and state, and the consequences of misclassification can be significant. Consult a professional.

EXERCISE 8.6: Complete the Delegation Audit on your worksheet and draft a job post for your first contractor role (even if you'll hire later).

LESSON 8.7

Tracking Revenue and Expenses

The Big Idea

In Module 2 you set up bookkeeping. Now you'll use your financial data to **make decisions.** Revenue is not profit, and profit is not cash. Understanding all three keeps your business healthy.

The Three Core Financial Reports

1. **Profit and Loss (P&L) / Income Statement:** revenue minus expenses over a period = net profit. Answers "Am I making money?"
2. **Balance Sheet:** what the business owns (assets), owes (liabilities), and the owner's equity at a point in time.
3. **Cash Flow:** money actually coming in and going out. Answers "Will I have enough cash to pay bills?"

Revenue vs. Profit vs. Cash

- **Revenue:** total sales.
- **Profit:** revenue minus expenses.
- **Cash:** what's in the bank. You can be profitable on paper but short on cash if customers pay late or inventory ties up money.

Monthly Financial Review (30 minutes)

1. Reconcile accounts and categorize all transactions.
2. Review the P&L: revenue, top expenses, net profit.
3. Compare to last month and the same month last year (when you have the data).
4. Check outstanding invoices (accounts receivable).
5. Check upcoming bills and tax payments.
6. Transfer tax savings and owner's draw.
7. Review subscriptions; cancel what you don't use.
8. Write one financial decision for next month.

Revenue by Source

Track where revenue comes from: product lines, services, channels (website, marketplace, referrals). This shows what to invest in.

Simple Cash Flow Forecast

List expected cash in and cash out for the next 4–12 weeks. It helps you spot shortfalls before they happen (e.g., a big inventory order the same month as a quarterly estimated tax payment).

> **EXAMPLE (HYPOTHETICAL):** A hypothetical gift-basket business reviews its P&L and finds revenue increased in December, but profit didn't, because rush shipping costs ate into margins. For next year, it sets an earlier order cutoff and builds shipping costs into holiday pricing.

AI Prompt: Explain My P&L

COPY-AND-PASTE AI PROMPT

Here is my monthly profit and loss summary: [PASTE CATEGORIES AND AMOUNTS]. Explain in plain language: how the business performed, the biggest expense categories as a % of revenue, anything unusual compared to last month [PASTE LAST MONTH], and 3 questions I should investigate. Don't give tax advice; suggest questions for my tax professional if relevant.

AI Prompt: Cash Flow Forecast

COPY-AND-PASTE AI PROMPT

Build a 12-week cash flow forecast table for my business. Starting cash: [AMOUNT]. Expected weekly income: [DETAILS/ASSUMPTIONS]. Recurring expenses: [LIST WITH DATES]. One-time expenses: [LIST]. Tax payments: [DATES/AMOUNTS]. Owner's draw: [AMOUNT/SCHEDULE]. Show weekly ending cash and flag any week that drops below [MINIMUM CUSHION]. Give me the spreadsheet formulas.

> **EXERCISE 8.7:** Complete your first monthly financial review using the worksheet checklist and create a 12-week cash flow forecast.

LESSON 8.8

Measuring Business Performance

The Big Idea

You can't improve what you don't measure. But measuring everything leads to confusion. Choose a small set of **Key Performance Indicators (KPIs)** that tell you whether your business is healthy and growing.

Choose Your KPIs by Area

Area	Example KPIs
Marketing	Website visitors, new leads, email subscribers, top traffic sources
Sales	Consultations booked, close rate, conversion rate, average order value
Customers	Repeat purchase rate, churn, reviews, feedback score
Operations	Delivery time, support requests, on-time rate
Finance	Revenue, gross margin, net profit, cash on hand, customer acquisition cost

Pick **5–7 KPIs** that match your current stage. A brand-new business might track: leads, conversations, sales, revenue, expenses, and cash. A more established one might add CAC, CLV, and churn.

Leading vs. Lagging Indicators

- **Lagging indicators** show results that already happened (revenue, profit).
- **Leading indicators** predict future results (outreach messages sent, consultations booked, content published, email list growth).

Focus your weekly actions on leading indicators you control. Revenue is the outcome of many activities.

The One-Page Dashboard

Create a simple spreadsheet with one row per week and columns for your KPIs. Add a "notes" column for what happened (launches, holidays, changes). Review weekly. Look for trends over weeks and months, not single data points.

Making Decisions With Data

1. **Spot the trend** ("Leads dropped three weeks in a row").
2. **Ask why** (fewer posts? seasonal? broken form?).
3. **Decide one action.**
4. **Measure the result** in the following weeks.

EXAMPLE (HYPOTHETICAL): A hypothetical bookkeeping freelancer tracks: outreach messages sent, consultation calls, new clients, monthly recurring revenue, and hours worked. She notices her consultations rise in the weeks she sends more outreach messages, so she schedules outreach as a fixed weekly block rather than doing it "when she has time."

AI Prompt: Choose My KPIs

COPY-AND-PASTE AI PROMPT

```
My business: [DESCRIPTION]. Stage: [e.g., pre-launch, first 3
months, 1 year in]. Main goal for the next 90 days: [GOAL].
Recommend 5-7 KPIs (mix of leading and lagging), explain why each
matters, how to measure it with free tools, and a target-setting
approach based on my own baseline (no industry averages).
Design a weekly dashboard layout for a spreadsheet.
```

AI Prompt: Monthly Performance Review

COPY-AND-PASTE AI PROMPT

```
Here's my KPI dashboard for the last [X] weeks: [PASTE TABLE].
Identify trends, the strongest and weakest areas, possible causes
(as hypotheses), and recommend 3 priorities for next month.
Be honest about where the data is too limited to conclude anything.
```

EXERCISE 8.8: Choose your 5–7 KPIs, build your one-page dashboard, and record your first week of data.

MODULE 8

Module 8 Worksheet

Part A: AI Workflow Plan

Workflow	Input	AI step (prompt name)	Human review	Output

Part B: Automation Inventory

Automation name	Trigger	Actions	Apps	Personal data?	Last tested

Part C: Email Marketing Setup

Item	Decision / status
Email tool	
Signup form location(s)	
Welcome sequence (number of emails)	
Newsletter frequency	

Item	Decision / status
Physical mailing address in footer	
Segments	

Part D: Retention

Repeat purchase rate (or estimate): _____%

Retention strategy I'll implement this month: _____

Part E: Operations Hub and SOPs

SOP	Area	Written?	Tested?

Part F: Delegation Audit

Task	Hours/week	Only me / Delegate / Automate / Stop

First role to hire: _____

Part G: Monthly Financial Review

- [ ] Accounts reconciled and transactions categorized
- [ ] P&L reviewed and compared to last month
- [ ] Outstanding invoices checked
- [ ] Upcoming bills and tax payments checked
- [ ] Tax savings and owner's draw transferred
- [ ] Subscriptions reviewed

One financial decision for next month: _____

Part H: KPI Dashboard

Week	KPI 1:	KPI 2:	KPI 3:	KPI 4:	KPI 5:	Notes

MODULE 8

Action Checklist

- [ ] Create a prompt library with at least five entries
- [ ] Build and test one no-code automation
- [ ] Start an automation inventory
- [ ] Set up an email tool, signup form, and welcome sequence
- [ ] Schedule your first newsletter
- [ ] Implement one customer retention strategy
- [ ] Create your Operations Hub folder structure
- [ ] Write SOPs for your two most frequent tasks
- [ ] Complete a delegation audit and draft a contractor job post
- [ ] Complete your first monthly financial review
- [ ] Build a 12-week cash flow forecast
- [ ] Choose 5–7 KPIs and start a weekly dashboard

MODULE 8

Knowledge Check

1. What are the two basic parts of every automation?
A) Input and password
B) Trigger and action
C) Email and phone
D) Start and stop

2. Which is required under CAN-SPAM for marketing emails?
A) Emailing daily
B) A clear opt-out and a valid physical postal address
C) Using purchased lists
D) Including discounts

3. Why is open rate considered an imperfect email metric?
A) It's always zero
B) Privacy features in some email apps can affect how opens are recorded
C) It's illegal to track
D) It measures purchases

4. What is a leading indicator?
A) Last year's revenue
B) An activity metric that predicts future results, like consultations booked
C) Total profit
D) Taxes paid

5. Which factors does the IRS consider for worker classification?
A) Age, location, and experience
B) Behavioral control, financial control, and the type of relationship
C) Hourly rate only
D) Whether the person likes the job

6. True or false: A profitable business can still run out of cash.

7. What should you collect from a U.S. contractor before paying them?
A) Form W-9
B) Form W-2
C) Their bank password
D) Nothing

8. What's the best first step before delegating a task?

A) Hire immediately

B) Document it in an SOP

C) Share all your passwords

D) Stop tracking it

MODULE 8

Answer Key

1. **B.** A trigger starts the automation; actions are what it does.
2. **B.** CAN-SPAM requires an opt-out mechanism and a valid physical postal address, among other rules.
3. **B.** Privacy features can affect open tracking, so treat open rates as a rough signal.
4. **B.** Leading indicators are activities that predict future outcomes.
5. **B.** The IRS considers behavioral control, financial control, and relationship factors.
6. **True.** Profit on paper doesn't guarantee cash in the bank, which is why cash flow forecasting matters.
7. **A.** Form W-9 provides the contractor's taxpayer information for reporting.
8. **B.** A documented process makes delegation clear and consistent.