

# AI Automation Playbook for SMEs

5 Workflows You Can Automate This Week — No Coding Required

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## Why This Playbook?

Most SMEs know AI can help — but they don't know **where to start**. This playbook gives you 5 concrete workflows that are proven to save time, reduce errors, and free up your team for strategic work.

Each workflow includes: what it automates, the business impact, and how to implement it — even without a technical team.

## Workflow 1: Invoice Processing & Accounts Payable

**The Problem:** Manual data entry from invoices into your accounting system. Slow, error-prone, and nobody enjoys it.

## What AI Does:

- Extracts line items, amounts, dates, and vendor info from PDF/image invoices
- Matches invoices to purchase orders automatically
- Flags discrepancies for human review (not blind automation)
- Pushes approved entries into Xero, QuickBooks, or your ERP

**Impact:** 60% faster processing. 90% fewer data entry errors. Your finance team focuses on analysis, not typing.

## Workflow 2: Lead Follow-Up & CRM Updates

**The Problem:** Leads come in from website, events, referrals — but follow-up is inconsistent. CRM data goes stale.

## What AI Does:

- Sends personalized follow-up emails within minutes of inquiry
- Updates CRM fields (source, stage, last touch) automatically
- Scores leads based on engagement signals
- Alerts your sales team when a hot lead needs human attention

**Impact:** 3x faster response time. No leads fall through the cracks. Pipeline visibility improves overnight.

## Workflow 3: Customer Support Triage

**The Problem:** Support tickets pile up. Simple questions (order status, password resets, pricing) consume senior staff time.

## What AI Does:

- Classifies incoming tickets by urgency and topic
- Auto-resolves common queries with accurate, branded responses
- Routes complex issues to the right team member
- Summarizes ticket history so agents have full context instantly

**Impact:** 40% of tickets resolved without human intervention. Average response time drops from hours to minutes.

# Workflow 4: Weekly Reporting & Dashboards

**The Problem:** Someone spends half a day every week pulling data from 3 systems to build a management report.

## What AI Does:

- Pulls data from your CRM, accounting, and project tools automatically
- Generates formatted weekly summary with KPIs, trends, and alerts
- Sends report to stakeholders via email or Slack every Monday
- Highlights anomalies ("revenue down 15% vs last week") for attention

**Impact:** From 4 hours/week to zero. Reports are more consistent and never late.

# Workflow 5: Document & Contract Review

**The Problem:** Reviewing vendor contracts, NDAs, and agreements takes days and often misses key clauses.

## What AI Does:

- Reads and summarizes key terms (payment, liability, termination, IP)
- Flags unusual or risky clauses against your standard templates
- Extracts renewal dates and obligations into a tracking system
- Generates a plain-English summary for non-legal stakeholders

**Impact:** Contract review from 2 days to 20 minutes. Fewer missed renewal dates. Better negotiating position.

# Getting Started: Your First Week

**Day 1-2:** Pick ONE workflow from this list. The one that causes the most pain right now.

**Day 3-4:** Map the current process: who does what, what tools are involved, where are the bottlenecks?

**Day 5:** Book a free 15-minute assessment with Nexus Labs. We will show you exactly how to automate it — and what results to expect in week 1.

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## Ready to automate?

Book your free 15-minute assessment:

[tidycal.com/melverick/discovery-call-via-zoom-30min](https://tidycal.com/melverick/discovery-call-via-zoom-30min)

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