

# Detailed Workflow Automation Analysis for Steve Perry

## Observed Repetitive Tasks & Automation Potential

### 1. Email Management Patterns

#### Current Manual Process:

- Archiving emails: 15-20 clicks per 10 emails (~3 seconds each)
- Snoozing emails: 5-8 clicks per snooze + date selection (~15 seconds each)
- Reply patterns: "Thanks!", "Following up", "Sounds good" (~30 seconds each)
- CC'ing himself on replies: Manual entry every time (~5 seconds)

#### Automation Solution:

```
IF email_replied THEN auto_archive(delay=2min)
IF email_contains("meeting", "call", "schedule") THEN suggest_snooze_date()
IF email_from(known_contact) THEN auto_cc("steve@emailthewell.com")
```

#### Time Saved Per Instance:

- Auto-archive: 3 seconds → 0 seconds
- Smart snooze: 15 seconds → 3 seconds
- Quick replies: 30 seconds → 5 seconds
- Auto-CC: 5 seconds → 0 seconds

### 2. Deal Creation Workflow

#### Current Manual Process (Observed):

1. Read introduction email (30 seconds)
2. Search LinkedIn for contact (45 seconds)
3. Search Google for company (30 seconds)
4. Navigate company website (60 seconds)
5. Open SignalHire, login, search (90 seconds)
6. Copy/paste data into 12+ fields (180 seconds)
7. Format and send email (60 seconds) Total: ~8 minutes per new deal

#### Automation Solution:

python

```
def create_deal_from_email(email):
    contact = extract_contact_info(email)
    company = enrich_company_data(contact.company)
    phone = signalhire_lookup(contact.name, company)

    deal = {
        'name': f"Advisor ({company.location}) {company.name}",
        'source': identify_referral_source(email),
        'contact': contact.full_details,
        'revenue': calculate_estimated_revenue(company.size),
        'stage': 'Engaged'
    }

    zoho_crm.create_deal(deal)
    send_intro_email(contact, calendly_link)
```

**Time Saved:** 8 minutes → 30 seconds (94% reduction)

### 3. Contact Research Pattern

#### Current Manual Process:

- LinkedIn search and profile review (60 seconds)
- Company website navigation (45 seconds)
- Job postings check (30 seconds)
- Contact info extraction (45 seconds) Total: ~3 minutes per contact

#### Automation Solution:

- Background AI agent performs all lookups in parallel
- Presents consolidated contact card with all relevant info
- Pre-fills CRM fields automatically

**Time Saved:** 3 minutes → 10 seconds (94% reduction)

### Scaling Analysis

#### 69-Minute Sample Extrapolation

#### Activities Observed:

- Email actions: 45 (archiving, replying, snoozing)
- Deal creations: 2 complete workflows
- Contact lookups: 5
- Document checks: 10
- Calendar actions: 3

## Daily Projections Based on Activity Frequency

### 4-Hour Workday (Half Day):

- Email actions: ~156 actions
- Deal creations: ~7 deals
- Contact lookups: ~17 lookups
- Document checks: ~35 checks
- Calendar actions: ~10 actions

### 8-Hour Workday (Full Day):

- Email actions: ~312 actions
- Deal creations: ~14 deals
- Contact lookups: ~35 lookups
- Document checks: ~70 checks
- Calendar actions: ~21 actions

## Time Savings Calculations

### Per Day (8 hours):

- Email automation:  $312 \times 8 \text{ sec} = 41 \text{ minutes saved}$
- Deal automation:  $14 \times 7.5 \text{ min} = 105 \text{ minutes saved}$
- Contact lookup:  $35 \times 2.8 \text{ min} = 98 \text{ minutes saved}$
- Document automation:  $70 \times 1 \text{ min} = 70 \text{ minutes saved}$
- Calendar automation:  $21 \times 2 \text{ min} = 42 \text{ minutes saved}$  **Total: 356 minutes (5.9 hours) saved daily**

### Per Week (5 days):

- Total time saved: 29.7 hours
- Equivalent to gaining 3.7 extra workdays

### **Per Month (20 days):**

- Total time saved: 118.7 hours
- Equivalent to gaining 14.8 extra workdays

### **Per Year (250 days):**

- Total time saved: 1,483 hours
- Equivalent to gaining 185 extra workdays
- Or 37 work weeks (9.25 months!)

## **Complex Integration Benefits**

### **1. Predictive Task Management**

Based on observed patterns, the AI can:

- Pre-draft Monday morning follow-ups on Friday
- Queue deal creation forms when intro emails arrive
- Suggest optimal email send times (noticed Steve sends follow-ups at specific times)

### **2. Intelligent Context Switching Reduction**

Currently Steve switches between apps 30+ times per hour. AI can:

- Aggregate all information in one interface
- Pre-fetch likely next actions
- Reduce switches by 80%

### **3. Error Prevention**

Observed errors that AI would prevent:

- Pasting URLs in wrong fields (happened 2x)
- Forgetting to CC himself
- Missing follow-up deadlines
- Duplicate searches for same contact

## **ROI Breakdown by Implementation Phase**

### **Month 1 (Email + Basic Automation)**

- Time saved: 2 hours/day

- Value: \$4,000 (at \$100/hour)
- Cost: \$3,000 development + \$400 expenses
- **Net ROI: \$600 (already positive!)**

## **Month 2 (CRM + Contact Intelligence)**

- Time saved: 4 hours/day
- Value: \$8,000
- Cost: \$3,000 development + \$400 expenses
- **Cumulative ROI: \$5,200**

## **Month 3 (Full Integration + Optimization)**

- Time saved: 5-6 hours/day
- Value: \$10,000-12,000
- Cost: \$3,000 development + \$400 expenses
- **Cumulative ROI: \$11,800-13,800**

## **Ongoing (Month 4+)**

- Time saved: 6 hours/day
- Monthly value: \$12,000
- Monthly cost: \$400 (expenses only)
- **Monthly profit: \$11,600**
- **Annual profit: \$139,200**

## **Why This Beats Hiring an Assistant**

### **Human Executive Assistant:**

- Salary: \$50,000-70,000/year
- Only works 8 hours/day
- Needs training, sick days, vacation
- Can make errors
- Can't scale beyond human limits

### **AI Executive Assistant:**

- One-time cost: \$9,000

- Works 24/7/365
- Never forgets, never tired
- Scales infinitely
- Improves over time with ML

## **Implementation Priorities**

### **Week 1-2: Quick Wins**

1. Email auto-archiving rules
2. Template quick replies
3. Calendar link automation

### **Week 3-4: Data Flow**

1. CRM field auto-population
2. Contact enrichment pipeline
3. Cross-platform search

### **Week 5-8: Intelligence Layer**

1. Predictive email drafting
2. Meeting prep automation
3. Follow-up scheduling

### **Week 9-12: Advanced Features**

1. Voice commands integration
2. Mobile optimization
3. Custom reporting dashboards

## **Conclusion**

The data clearly shows that Steve spends 70-80% of his time on repetitive, automatable tasks. By implementing this AI Executive Assistant, he can reclaim the majority of his day for high-value activities like relationship building, strategic planning, and business development. The ROI is not just positive—it's transformative.