

AI Automation Playbook

10 Recipes to Save 20+ Hours/Week

Ø=Ý Recipe 1: Lead Qualification Bot

Webhook !' GPT-4 classifies lead !' CRM update !' Slack alert
Setup: 30 min | Saves: 5h/week
Tools: Zapier + OpenAI API

Ø=ÜÄ Recipe 2: Invoice Processing

Email attachment !' OCR !' GPT-4 extracts data !' Xero entry
Setup: 45 min | Saves: 3h/week
Tools: Mailparser + OpenAI + Xero

Ø=Üñ Recipe 3: Social Content Pipeline

RSS trigger !' GPT-4 writes post !' Schedule via Buffer API
Setup: 20 min | Saves: 4h/week
Tools: Zapier + OpenAI + Buffer

Ø=ÜK Recipe 4: Customer Onboarding

Stripe webhook !' Welcome email !' AI walkthrough !' Slack intro
Setup: 1h | Saves: 6h/week
Tools: Stripe + ConvertKit + Slack

Ø=ÜÝ Recipe 5: Meeting Notes !' Action Items

Zoom transcript !' GPT-4 summarizes !' Notion page !' Assignees
Setup: 15 min | Saves: 2h/week
Tools: Otter.ai + OpenAI + Notion

Ø=Ý Recipe 6: Competitor Monitoring

Daily scrape !' GPT-4 analyzes changes !' Digest email
Setup: 30 min | Saves: 3h/week
Tools: Apify + OpenAI + Gmail

Ø<ß« Recipe 7: Support Ticket Triage

New ticket !' AI categorizes !' Routes to team !' Suggests reply
Setup: 45 min | Saves: 8h/week
Tools: Intercom + OpenAI

🔗 Recipe 8: Proposal Generator

Client form → GPT-4 drafts proposal → PDF → Email send
Setup: 1h | Saves: 4h/week
Tools: Typeform + OpenAI + DocuSign

🔗 Recipe 9: SEO Content Brief

Keyword → GPT-4 creates outline → Brief doc → Writer assigned
Setup: 20 min | Saves: 2h/week
Tools: Ahrefs + OpenAI + Notion

🔗 Recipe 10: Expense Categorization

Receipt photo → OCR → GPT-4 categorizes → Spreadsheet row
Setup: 15 min | Saves: 1.5h/week
Tools: Expensify + OpenAI + Sheets

Recommended Tools

- 🔗 **Zapier** — Connect 6,000+ apps with no-code AI — zapier.com
- 🔗 **Make** — Visual automation builder — make.com
- 🔗 **Relevance AI** — Build & deploy AI agents — relevanceai.com

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